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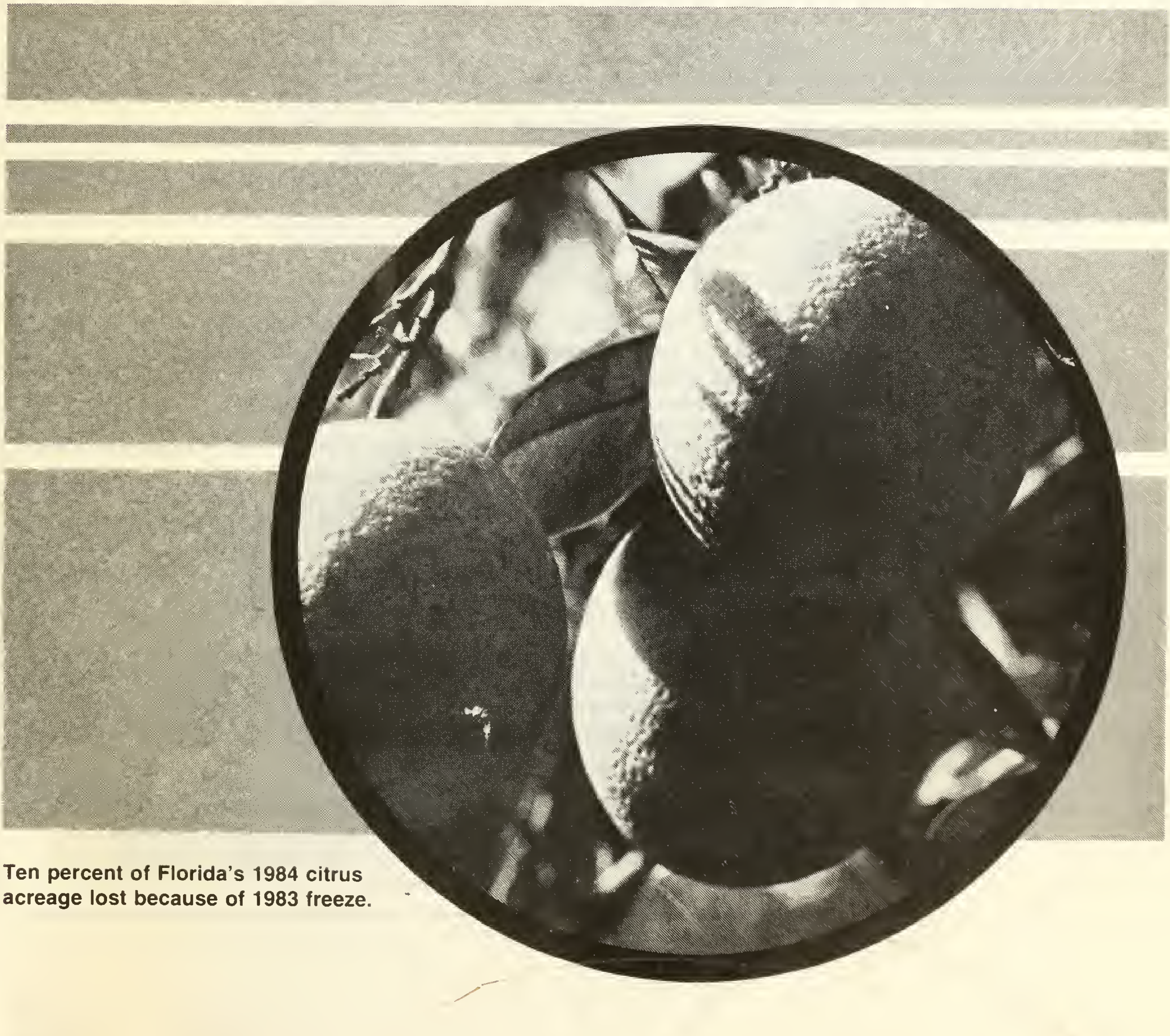
Fruit

Outlook and Situation Report



Ten percent of Florida's 1984 citrus acreage lost because of 1983 freeze.

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This issue of the *Fruit Outlook and Situation* should have reached you much faster than the past few issues. We have accelerated our production process to speed delivery to you of the timely data and analysis contained in all outlook and situation reports.

Approved by the World Agricultural Outlook Board. Summary released November 8, 1984. The next summary of the *Fruit Outlook and Situation* is scheduled for release on March 1985. Summaries of Outlook and Situation reports may be accessed electronically. For details, call (402) 472-1982 or (301) 588-1572. Full reports, including tables, are provided by the system on (402) 472-1982.

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SUMMARY

As of Ootober 1, of U.S. citrus production for 1984/85 was forecast at 11.5 million tons, 8 percent above 1983/84, but still 15 percent below 1982/83. (This forecast excludes California's crop outside of the Desert areas and the Texas citrus crop.) Larger crops are indicated for all citrus except tangerines. Because of tree damage from the December 1983 freeze, supplies from Texas are expected to be insignificant and are not being forecast. The Florida citrus canker hasn't yet had any impact on crop forecasts.

Total orange output for 1984/85 is forecast at 184 million boxes (excluding Texas), 8 percent above last season's freeze-damaged crop (including Texas), but 18 percent below 1982/83 (including Texas). Fresh orange prices at all levels have been well above a year ago, but are expected to decline seasonally. However, the smaller supplies of early, mid-season, and navel oranges, coupled with rising demand from consumers and packers, will keep orange prices relatively high this fall and early winter.

October 1 prospects for this season's U.S. grapefruit production (excluding California's crop outside of the Desert areas and Texas grapefruit) indicate 52 million boxes, 5 percent above last season (including Texas), but down 10 percent from 1982/83 (including Texas). Crops in Arizona, California, and Florida are projected to be substantially larger. Fresh-market demand for Florida grapefruit is expected to rise because of the limited available supplies from Texas. However, export markets for fresh grapefruit do not look encouraging in light of the strong U.S. dollar and other factors. Nevertheless, good movement and lower ending stocks of most processed grapefruit products will strengthen processor demand. Thus, the larger crop is not likely to exert any downward pressure on prices.

The Arizona-California lemon crop (tree crop available for harvest) for 1984/85 is expected to total 27 million boxes, 26 percent more than 1983/84. Crop prospects are up 25 percent for California and 30 percent for Arizona. F.o.b. prices for fresh lemons have averaged moderately above a year ago. This season's larger crop should weaken prices as the season progresses, pushing them below last season's high.

The 1984/85 pack of frozen concentrated orange juice (FCOJ) in 1984/85 is expected to exceed last season because of the larger Florida orange crop and higher juice yield. The first forecast of the upcoming season's juice yield is 1.46 gallons a box at 42.0 degrees Brix, compared with 1.29 last season. However, domestic supplies still will be light because of prospective reduced stocks going into 1984/85. To meet domestic demand, FCOJ imports will remain heavy. Demand should stay up with the relatively good economy, so prices are not likely to weaken.

The 1984 nonoitrus crop--including major tree fruits, grapes, and cranberries--is forecast at 12.6 million tons, down fractionally from last year. The decrease primarily reflects a moderately reduced grape crop. The pear crop is also estimated to be 11 percent smaller, with a 14-percent decline in winter pear production. Apple production is down 1 percent from 1983. Consequently, fresh noncitrus fruit supplies will be lower this fall and winter, and prices will likely be higher than a year ago.

This season's pack of several canned noncitrus fruits will be up from last season. Nevertheless, with depleted ending stocks, supplies of most canned fruit will be small. Prices are expected to stay strong, as reflected by packers' recent price hikes. Supplies of frozen fruit and berries will be adequate to ample. Good supplies, combined with lower grower prices, point to wholesale prices that will be lower than a year ago. Heavy stocks of raisins will result in substantially larger supplies, even with a smaller output in prospect. Consequently, prices at all levels will remain below a year earlier.

Supplies of tree nuts will be plentiful during 1984/85. Larger crops are estimated for all nuts except pecans. Demand is expected to be relatively good, but almond and pecan prices will be below last season. However, filbert and walnut prices may be near a year earlier.

GENERAL PRICE OUTLOOK

The index of grower prices for fresh and processing fruit so far this year has averaged sharply above a year ago. The October index stood at 287 (1977=100), 150 percent above a year earlier. Substantially to sharply higher prices were indicated for all fruit except strawberries. Prices are expected to decline this fall and early winter because of seasonal increases in supplies of apples and citrus, but are still expected to remain above a year ago, reflecting rising demand and smaller supplies of noncitrus. In addition, the smaller early, mid-season, and navel orange crops, combined with rising processor demand, will hold citrus prices relatively firm through the early winter.

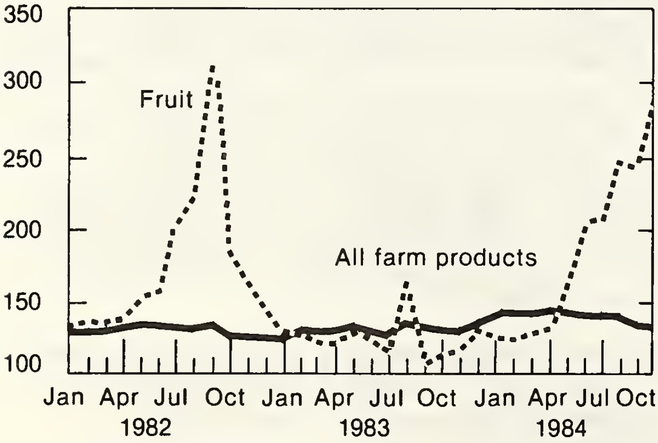
Table 1.--Index of annual and quarterly prices received by growers for fresh and processing fruit, 1981-84

Year	Annual	1st	2nd	3rd	4th
			1977=100		
1981	130	119	123	135	142
1982	175	137	151	248	164
1983	128	129	128	127	126
1984		129	166	246	

SOURCE: Agricultural Prices, SRS, USDA.

Prices Received by Producers, Fruit and All Farm Products

1977 = 100



Producer prices of most canned fruit have been higher than a year ago. Although the canned fruit pack is expected to be up for some items, depleted stocks will result in small supplies for most canned fruit. The Bureau of Labor Statistics' (BLS) September producer price index for canned fruit was 264.0 (1967=100), almost 4 percent higher than a year ago. With smaller supplies and the higher costs of fruit, wholesale prices are expected to remain firm.

In contrast, sharply increased supplies of frozen tart cherries will weaken prices. Supplies of frozen strawberries should be adequate for market demand, even though the total output will be smaller than last season. Larger carryin stocks, combined with increased imports and lower costs of berries, will keep prices of frozen strawberries relatively low. Likewise, supplies of raisins will be ample, so prices are expected to be lower than recent years.

The larger citrus crop will result in increased output of most processed citrus products. However, supplies of most processed citrus are not likely to rise appreciably because of smaller carryover stocks. Demand for processed citrus items will probably continue to be good in view of the relatively good economy. Consequently, prices of most processed citrus products are expected to remain firm.

Retail prices of fresh fruit during the summer averaged moderately above last year's levels. Higher prices for apples and citrus dominated the increase. As supplies of these fruit increase seasonally, retail prices are expected to decline through the early winter. However, smaller supplies of apples; winter pears; and early, mid-season, and navel oranges will likely hold prices relatively high.

Reflecting higher prices for canned fruit and FCOJ, retail prices of processed fruit have been moderately higher than a year ago. However, the BLS September index of consumer prices for processed fruit declined to 163.1, from 164.3 in August. It is now 8 percent above last year and is likely to continue higher through the winter, particularly for canned fruit.

Fresh Fruit: BLS Consumer Price Index

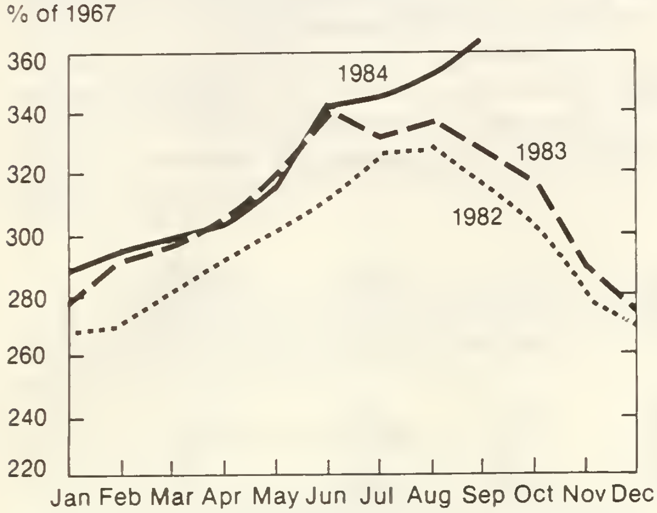


Table 2.--Annual and quarterly consumer price indexes for fresh fruit, 1981-84

Year	Annual	1st	2nd	3rd	4th
			1967=100		
1981	278	256	276	302	279
1982	309	289	322	333	293
1983	296	274	301	324	285
1984		295	321	355	

SOURCE: Bureau of Labor Statistics, U.S. Department of Labor.

Table 3.--Annual and quarterly producer price indexes for canned fruit, 1981-84

Year	Annual	1st	2nd	3rd	4th
			1967=100		
1981	243	239	239	243	249
1982	251	254	253	250	245
1983	252	246	247	253	261
1984		269	269	268	

SOURCE: Bureau of Labor Statistics, U.S. Department of Labor.

FRESH CITRUS

The first forecast of U.S. citrus production (excluding grapefruit in California's "other areas" and the Texas citrus crop) for 1984/85 is estimated at 11.5 million tons, 8 percent above 1983/84, but still 15 percent below the 1982/83 crop (including Texas). As of October 1, larger crops are indicated for all citrus except tangerines. The citrus canker has not yet had any impact on Florida citrus forecasts.

Oranges

Larger Crop in Prospect

The first forecast of U.S. orange production for 1984/85, excluding Texas, is 184 million boxes, 10 percent above last season's freeze-damaged crop (including Texas), but 16 percent below 1982/83. In Florida, the forecast for the production of all oranges is 119 million boxes, 2 percent above last season's crop, but 15 percent below 1982/83. Production of Florida early and mid-season varieties, at 59 million boxes, is 15 percent less than last season and 16 percent below the 1982/83 crop. Florida Valencia production is expected to total 60 million boxes, 28 percent more than last season's crop, but 14 percent below 1982/83 production. However, Florida orange production is not likely to recover to a historically high level for several years, reflecting the decreased bearing acreage.

The 1984 census of all orange acreage in Florida totaled 573,991, a decrease of 10 percent from the 636,864 acres reported in the 1982 tree census. There were 61,619 acres set in 1982 and 1983, and 124,492 acres lost since 1982, which resulted in a net decrease of 62,873. The 1984 survey shows the total bearing acreage of all oranges to be 474,269, compared with 560,203 in 1982, a decline of 15 percent from the 1982 census estimate. The decrease is primarily due to the December 1983 freeze.

California's 1984/85 orange crop is forecast at 62 million boxes, 28 percent more than last season, but 19 percent below 1982/83. The navel crop in California is expected to total 35 million boxes, 5 percent

Table 4.--Citrus fruit: Production, 1982/83, 1983/84, and indicated 1984/85 1/

Crop and State	Boxes			Ton equivalent		
	Used		Indicated 1984/85	Used		Indicated 1984/85
	1982/83	1983/84		1982/83	1983/84	
	1,000 boxes 2/			1,000 short tons		
Oranges:						
Early, midseason, and Navel varieties 3/:						
California	40,200	33,300	35,000	1,508	1,249	1,313
Florida	70,200	69,700	59,000	3,159	3,136	2,655
Texas	3,590	2,400	(4)	152	102	(4)
Arizona	1,050	550	1,000	39	21	38
Total	115,040	105,950	5/ 95,000	4,858	4,508	5/ 4,006
Valencias:						
California	35,900	15,000	27,000	1,346	563	1,013
Florida	69,400	47,000	60,000	3,123	2,115	2,700
Texas	2,090	110	(4)	89	5	(4)
Arizona	2,750	1,250	1,700	103	47	64
Total	110,140	63,360	5/ 88,700	4,661	2,730	5/ 3,777
All oranges:						
California	76,100	48,300	62,000	2,854	1,812	2,326
Florida	139,600	116,700	119,000	6,282	5,251	5,355
Texas	5,680	2,510	(4)	241	107	(4)
Arizona	3,800	1,800	2,700	142	68	102
Total oranges	225,180	169,310	5/ 183,700	9,519	7,238	5/ 7,783
Grapefruit:						
Florida all	39,400	40,900	44,500	1,674	1,738	1,892
Seedless	34,600	36,400	41,000	1,470	1,547	1,743
Pink	12,800	13,400	14,000	544	569	595
White	21,800	23,000	27,000	926	978	1,148
Other	4,800	4,500	3,500	204	191	149
Texas	11,200	3,200	(4)	448	128	(4)
Arizona	2,700	2,100	3,500	87	67	112
California 6/	7,300	6,440	--	238	211	--
Desert Valleys	4,100	3,340	3,800	131	107	122
Other areas	3,200	3,100	(6)	107	104	(6)
Total grapefruit	60,600	52,640	--	2,447	2,144	--
Lemons:						
California	20,300	17,250	21,600	772	655	821
Arizona	5,050	4,000	5,200	191	152	198
Total lemons	25,350	21,250	26,800	963	807	1,019
Limes:						
Florida	1,700	1,500	1,600	68	60	64
Tangelos:						
Florida	3,800	3,600	3,700	171	162	167
Tangerines:						
Florida	2,250	2,000	1,500	107	95	71
Arizona	1,100	950	750	41	35	28
California	2,150	1,850	1,900	81	70	71
Total tangerines	5,500	4,800	4,150	229	200	170
Temples:						
Florida	4,700	2,900	3,700	211	130	167
Total citrus	326,830	256,000	7/ 275,450	13,608	10,741	7/ 11,496

1/ The crop year begins with bloom of the first year shown and ends with completion of harvest the following year. 2/ Net content of box varies. Approximated averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas 85 lbs.; Grapefruit-California, Desert Valleys and Arizona, 64 lbs.; other California areas, 67, lbs.; Florida, 85 lbs.; Texas, 80 lbs.; Lemons, 76 lbs.; Limes 80 lbs.; Tangelos, 90 lbs.; Tangerines-California and Arizona, 75 lbs.; Florida, 95; and Temples 90 lbs. 3/ Navel and miscellaneous varieties in California and Arizona. Early and midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. 4/ Due to the severe freeze of December 1983, the 1984/85 Texas citrus crops are very limited and forecasts will not be issued this season unless sufficient commercial supplies become available. 5/ Excludes Texas. 6/ The first forecast for California grapefruit "other areas" will be as of April 1, 1985. 7/ Excludes California grapefruit in "other areas" and Texas citrus crops.

SOURCES: Crop Production, SRS, USDA and Florida Crop and Livestock Reporting Service.

more than 1983/84, but 13 percent below 1982/83. The crop is sizing well, with good quality. California's Valencia forecast, at 27 million boxes, is 80 percent more than last season's small crop, but 25 percent less than in 1982/83. Arizona's outturn of all oranges is expected to total 2.7 million boxes, 50 percent more than last season, but 29 percent below the 1982/83 crop.

Orange supplies from Texas are expected to be insignificant and are not being forecast because of the December 1983 freeze that severely damaged trees.

Relatively High Prices Expected

On-tree returns for oranges for all sales so far have averaged significantly above a year ago. In October, on-tree returns advanced further to $15.01 a box, compared with $1.06 a year ago. Orange prices are expected to fall seasonally through early winter. However, the smaller supplies of early, mid-season, and navel oranges and rising demand from processors will keep orange prices relatively high. In addition, reduced competition from smaller crops of apples and winter pears will also help hold orange prices firm.

U.S. grower prices for fresh and processing oranges during 1983/84 averaged $5.44 a box (equivalent on-tree returns), compared with $4.15 a year earlier. The sharp price increase was attributable to a greatly reduced crop---the result of the freeze in Florida and Texas. In addition, the decreased California-Arizona crop further strengthened orange prices. However, because of the smaller production, the total value of orange production during the past season was estimated at $1.2 billion (equivalent packinghouse-door returns), only slightly below 1982/83's $1.3 billion.

Table 5.--Florida commercial citrus acreage, 1966-1984

Census years	Oranges	Grapefruit	Specialty fruit 1/	Total
		Acres		
1966	673,086	103,224	81,772	858,082
1968	713,400	119,883	97,966	931,249
1970	715,806	124,050	101,615	941,471
1972	659,418	124,142	94,459	878,019
1974	642,431	130,326	91,341	864,098
1976	628,567	137,909	85,893	852,369
1978	616,020	136,342	78,873	831,235
1980	627,174	139,944	78,165	845,283
1982	636,864	139,939	71,053	847,856
1984	573,991	134,680	52,694	761,365

1/ Temples, tangerines, and tangelos.

SOURCE: Florida crop and Livestock Reporting Service

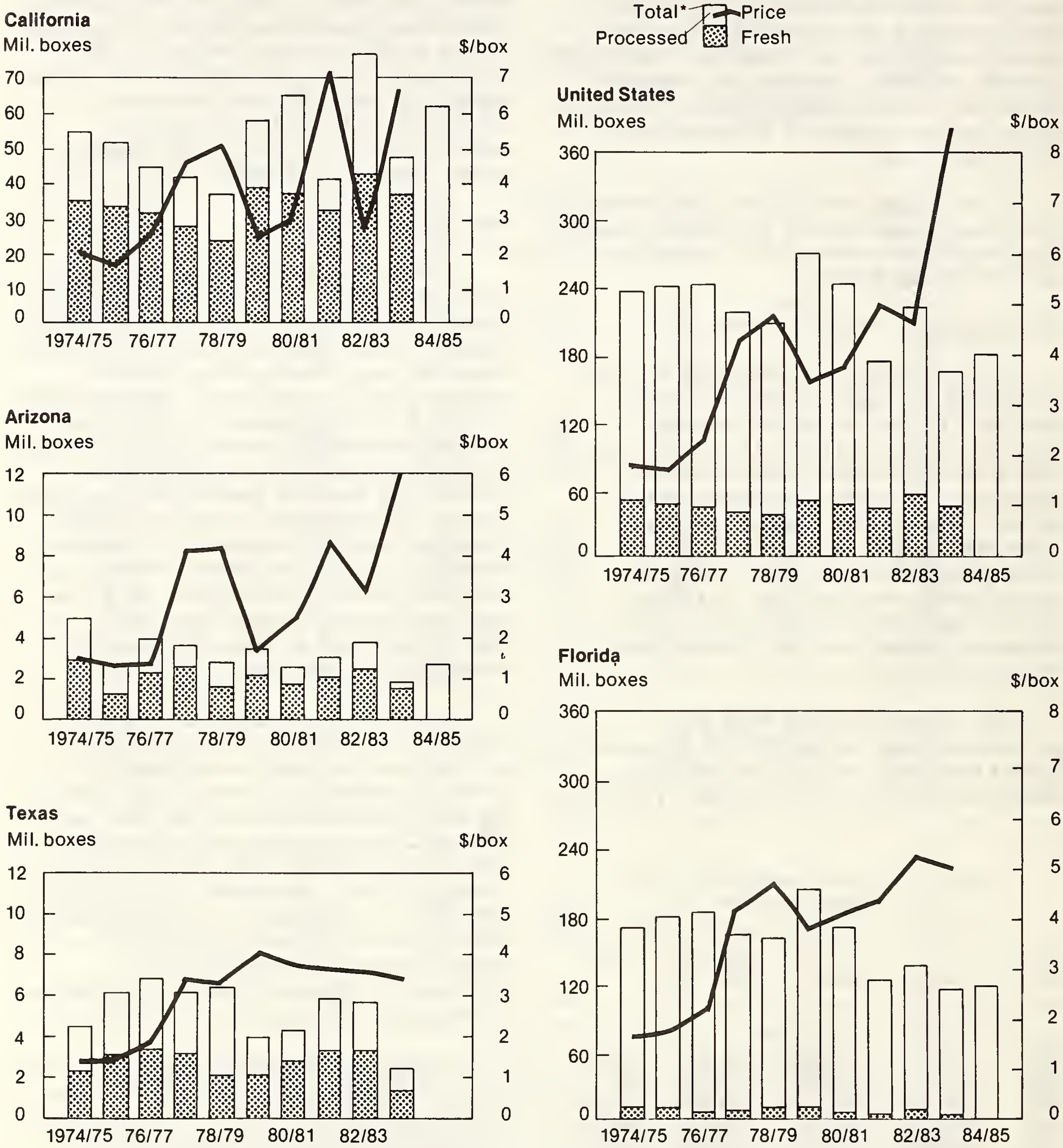
Weak Exports

Foreign demand for U.S. fresh oranges declined sharply during 1983/84. Through August, U.S. exports of fresh oranges totaled 342,941 metric tons, down 16 percent from the preceding year. Reduced exports were recorded for almost all areas. The high prices, combined with the strong U.S. dollar, have severely reduced the demand for U.S. oranges in European markets, particularly in the Netherlands, Belgium, Luxemburg, France, and Sweden. Shipments to Canada, our major customer, also fell considerably. However, Hong Kong, the second largest market, has purchased only moderately less than a year ago. Also, purchases from Japan, the third-ranked market, showed only a slight decrease so far this season.

Because the U.S. dollar has remained strong, prospects for U.S. orange exports do not look very favorable, even though U.S. prices are expected to average lower than in 1983/84. On the other hand, the new trade agreement between the United States and Japan for an increased import quota of U.S. oranges will raise shipments to Japan during 1984/85. The Japanese Government recently announced that the total quota for fresh oranges during its fiscal 1985 (April 1984-March 1985) was 93,000 metric tons, an increase of 11,000 from the previous year.

The reduced supplies of U.S. fresh oranges have resulted in sharply increased imports, totaling 15,232 metric tons this season through August, up 215 percent from a year ago. Mexico, the leading supplier, recorded a 116-percent jump from a year earlier.

Oranges: Production, Utilization, and Prices



California

Arizona

Texas

United States

Florida

Year beginning October. *Production having value. Prices-on-tree returns. 1984/85 data as of October 1, indication of total production. Due to the severe freeze of December 1983 the 1984/85 Texas citrus crops are very limited and forecasts will not be issued this season.

Grapefruit

Substantially Larger Crop Likely

October 1 prospects for this season's U.S. grapefruit crop (excluding California's crop outside of the Desert areas and Texas grapefruit), indicate 51.8 million boxes, 5 percent above last season, but down 10 percent from the 1982/83 crop (including Texas grapefruit). California's grapefruit production outside of the Desert area, which will be forecast as of April 1, 1985, accounted for 3.1 million boxes last season and 3.2 million in 1982/83.

Florida's total grapefruit forecast, 44.5 million boxes, is 9 percent above last season and 13 percent more than in 1982/83. Prospective production in California's Desert areas, at 3.8 million boxes, will be 14 percent above the previous season, but 7 percent less than the 1982/83 crop. Arizona growers expect to harvest 3.5 million boxes, compared with 2.1 million last year. As with oranges, grapefruit supplies from Texas are expected to be insignificant and are not being forecast.

The increased Florida grapefruit production is entirely attributable to rising yields, because the 1984 bearing acreage decreased 8,196 from 1982. The 1984 Florida citrus census shows a total of 134,680 acres, compared with 139,939 in 1982. However, new plantings increased sharply, totaling 10,141 acres for 1982 and 1983, as compared with only 5,404 for 1980 and 1981.

Market Prospects Favorable

Despite the temporary embargo on interstate shipments of all fresh Florida citrus to other citrus-growing States due to the citrus canker in nurseries, shipments of fresh grapefruit are running well ahead of last season's pace. Demand for Florida grapefruit for the fresh market is expected to rise because supplies of grapefruit from Texas will be limited. However, export markets for fresh grapefruit do not look favorable in view of the continued strong U.S. dollar.

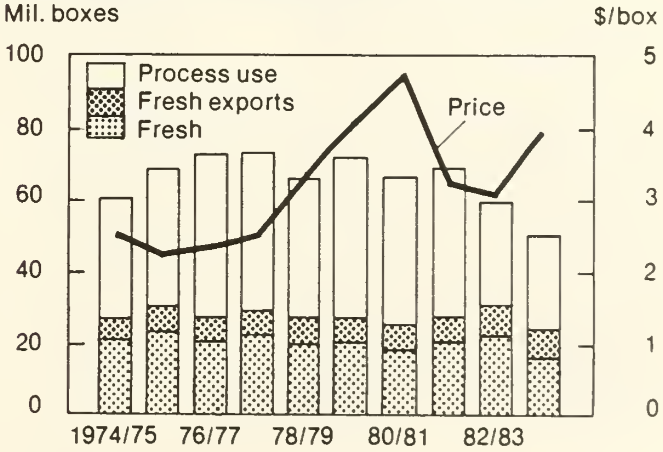
Carryover stocks of most processed grapefruit products are down substantially, so processor demand is expected to be strong this season. Even with higher prices, the movement of most grapefruit juice has increased and will probably continue so during 1984/85 in view of the relatively good economy. Thus, the larger crop is not likely to exert any downward pressure on prices. Opening f.o.b. prices for Florida fresh grapefruit were generally above a year ago. F.o.b. prices are expected to fall with increased volumes, but they will probably remain relatively high through the early winter.

A smaller crop due to the Florida and Texas freeze sharply escalated grapefruit prices in all producing areas in 1983/84. Rising demand and reduced carryin stocks for most processed grapefruit products also caused drastically higher on-tree returns for processing grapefruit, ranging from 180 percent in Florida to fivefold in Texas, compared with the previous season. Consequently, on-tree returns for Florida grapefruit for all sales averaged $2.57 a box, compared with $1.96 in 1982/83. The on-tree returns for Texas grapefruit for all sales averaged $2.03 a box, compared with $1.26 in 1982/83. The overall U.S. price for grapefruit averaged $2.54 a box, up from $1.79 in 1982/83.

Export Prospects Unfavorable

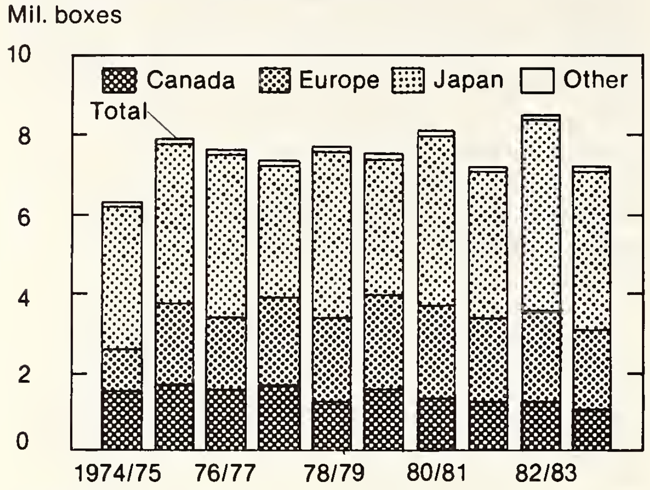
U.S. exports of fresh grapefruit decreased substantially during 1983/84, totaling 262,023 metric tons, compared with 309,396 during the preceding season. The overall decrease was caused by reduced shipments to all major

U.S. Grapefruit Production, Use, and Prices



Price-season average packinghouse-door returns.
Season beginning September.

U.S. Exports of Fresh Grapefruit



Season beginning September.

areas. The reduced supplies, high prices, and strong U.S. dollar hurt fresh grapefruit exports. The ethylene dibromide (EDB) problem and the cold treatment were also contributors.

Japan, the United States' leading customer, bought 16 percent less than last season. A 10-percent smaller purchase was recorded from Canada, the second largest market. The weak markets in France, West Germany, and the United Kingdom were primarily responsible for an 18-percent decline in shipments to Europe. Canada, Europe, and Japan accounted for almost 98 percent of total U.S. grapefruit exports in 1983/84. With the strong U.S. dollar and expected relatively high prices, export prospects for 1984/85 are not bright.

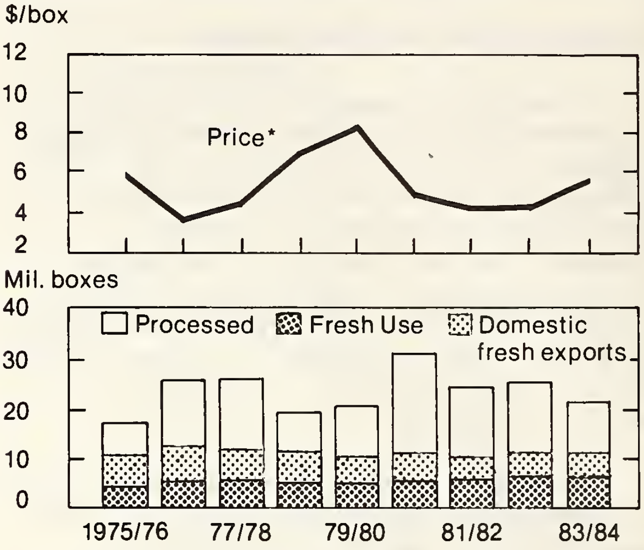
Lemons

Crop Significantly Larger

The Arizona-California lemon crop (tree crop available for harvest) for 1984/85 is expected to total 26.8 million boxes, 26 percent more than 1983/84. The California crop, estimated at 21.6 million boxes, is 25 percent greater than last season. Crop maturity is slightly ahead of normal. Quality and sizing are good in all areas. Arizona's output is expected to total 5.2 million boxes, 30 percent more than last season.

Despite a larger crop, total movement through October 27 was moderately behind last year's pace. However, deliveries to the fresh market have been near last season's level. In response to reduced shipments, f.o.b. prices for fresh lemons have averaged $11.66 a carton for this season through November 3, compared with $10.81 a year earlier. F.o.b. prices are expected to fall as the season progresses.

U.S. Lemon Production, Use, and Price



*Price-season average packinghouse-door returns.
Year beginning August.

The smaller 1983/84 crop resulted in a sharp price increase for all lemon sales (equivalent on-tree returns), averaging $2.23 a box, compared with $1.23 a year earlier. This season's larger crop should push lemon prices below 1983/84's levels.

Other Citrus Fruit

Slightly Larger Tangelo Crop

The Florida tangelo crop, excluding K-early citrus fruit, is forecast at 3.7 million boxes, 3 percent more than the 1983/84 crop, but 3 percent less than 1982/83. More of the tangelo crop goes to processing outlets than to the fresh market. Last season, 56 percent of the crop was processed, and the remaining 44 percent sold fresh. Larger supplies of oranges early in the season caused grower prices for tangelos to be well below the previous season's levels, even with a smaller crop. The average grower price (equivalent on-tree returns) for all sales was $3.51 a box in 1983/84, compared with $4.37 a year earlier. Lower prices were recorded for both fresh market and processing outlets. Prices for this season are not expected to decline appreciably because processor demand is likely to rise.

Tangerine Crop Down

The first forecast of the tangerine crop is 4.15 million boxes, 14 percent less than last season and 25 percent below 1982/83. The Florida forecast, at 1.5 million boxes, is for that portion of the crop that is expected to reach size 210 fruit per 4/5-bushel carton by December 1 for the variety Dancy, and by November 1 for Robinson. California's tangerine crop, at 1.9 million boxes, is up 3 percent from last season's production. Arizona growers expect to harvest 750,000 boxes, 21 percent less than was harvested last season.

Last season, 64 percent of the tangerine crop was shipped to the fresh market, up from 62 percent the season before. U.S. grower returns (equivalent on-tree returns) for all sales averaged $4.93 a box, down slightly from last season. The lower returns were attributed entirely to the sharply reduced prices for Florida tangerines. With the substantially reduced crop, prices this season are likely to rise from last year.

Temple Prospects Good

Florida's Temple crop is forecast at 3.7 million boxes, 28 percent above last season's freeze-damaged crop, but 21 percent below 1982/83. Because of the freeze damage, a much larger portion of the 1983/84 crop was processed--74 percent compared with 67 percent in 1982/83. The freeze sharply boosted prices for fresh sales. The season-average return for the fresh market was $8.30 a box (equivalent on-tree returns), up from $4.50 the previous season. Consequently, the season-average return for all sales was $4.86 a box, up 22 percent from 1982/83. Prices for this season are not expected to decline appreciably, even with a larger crop.

PROCESSED CITRUS

Use Down for Both Fresh and Processing

Because of the sharply smaller Florida citrus crop, the quantity for processing use totaled 7.2 million tons in 1983/84, down 22 percent from 1982/83. The portion of citrus fruit used for processing was also down, from 68 percent in 1982/83 to 67 percent in 1983/84. Processing use was down for all citrus crops except tangelos. Slightly less than three-quarters of the oranges were processed, along with 53 percent of the grapefruit and 46 percent of the lemons.

The smaller Florida orange crop caused processing use to drop considerably, but the portion of oranges used for processing, at 93.4

Table 6.--Oranges and grapefruit processed, Florida 1981/82-1983/84

Crop and season	Frozen concentrates	Chilled products: Juice	Chilled products: Sections and salads	Other processed 1/	Total processed
	1,000 boxes				
Oranges 2/:					
1981/82	105,150	16,293	225	4,473	126,141
1982/83	114,627	18,084	170	2,665	135,546
1983/84	94,016	16,981	364	3,076	114,437
Grapefruit:					
1981/82	20,052	1,697	628	9,004	31,381
1982/83	13,977	1,314	417	5,379	21,087
1983/84	18,728	1,320	320	3,871	24,239

1/ Includes cannery juice, blends, sections, and salads. 2/ Includes tangelos, Temples, tangerines, and K-early citrus.

SOURCE: Citrus Fruits, SRS, USDA.

percent, was up slightly from 1983/84. Because of the freeze damage, fresh sales of Florida oranges fell 26 percent in 1983/84. Although the quantity of oranges--including tangelos, Temples, tangerines, and K-early citrus--used for FCOJ fell 18 percent from 1982/83, it still accounted for 82 percent of the oranges used for processing, compared with 85 percent in 1982/83.

The freeze also resulted in a substantial decrease in fresh sales of grapefruit, despite a slightly larger crop. As a result, the percentage of the grapefruit used for processing increased to 59 percent of the total, up from 54 percent in 1982/83.

The number of Texas oranges that were sold fresh fell 58 percent from 1982/83. However, even though the amount of Texas oranges used for processing decreased 52 percent, its share of the total orange crop increased to 45 percent, from 41 percent in 1982/83. Likewise, the freeze drastically reduced the quantity of grapefruit available for both fresh and processing uses.

Because of the sharply reduced availability of Florida and Texas oranges for the fresh market, a substantially larger portion of the California orange crop was sold fresh. Fresh sales accounted for 78 percent of the California crop, compared with 57 percent in 1982/83. Likewise, a larger share of Arizona-California grapefruit was sold fresh. Even with a significantly smaller crop, the quantity of U.S. lemons sold fresh was near the previous year's level, primarily reflecting strong prices. Consequently, the fresh market accounted for 54 percent of the total U.S. lemon crop, compared with 46 percent in 1982/83.

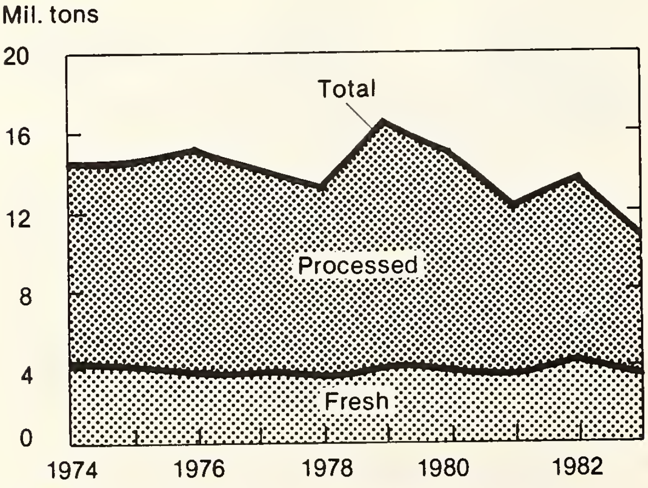
Diminished Carryover of Frozen Concentrates Expected

Florida's 1983/84 pack of FCOJ totaled almost 122 million gallons (excluding reprocessed), down 29 percent from 1982/83 because of the December freeze. Processors only recovered 1.29 gallons a box at 42.0 degree Brix, compared with 1.48 for the 1982/83 crop. Consequently, even with heavy imports, the smaller carryin stocks and pack still pushed the total supply of FCOJ below 1982/83.

Despite the price escalation, movement of FCOJ has been relatively good, amounting to 203 million gallons through October 20, down only slightly from a year earlier. F.o.b. prices for FCOJ (unadvertised brand, f.o.b., Florida canneries) have been steady at $5.04 a dozen 6-ounce cans, compared with $3.95 a year earlier. With the smaller supplies and relatively good movement, stocks as of October 27 were 5 percent below a year earlier. It appears that the carryover could approach 35 to 40 million gallons, compared with 43 million a year earlier.

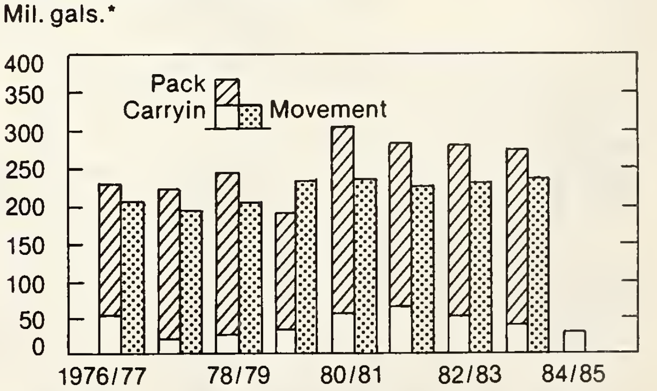
The larger orange crop and higher juice yield will result in a sharply larger pack of FCOJ in 1984/85. The forecast for the

Citrus Fruit Production and Utilization



Beginning crop year indicated.

Florida Supply and Movement of Frozen Concentrate Orange Juice



*From 1976/77 through 1979/80, 45° BRIX, 1980/81, 43.4° BRIX. Beginning 1981/82 BRIX change to 42.0°. Pack includes imports. Year beginning December 1. 1983/84 pack and movement estimated. 1984/85 carryin estimated.

1984/85 juice yield is 1.46 gallons a box at 42.0 degree Brix. In addition, a larger quantity of Florida oranges will likely be used for processing juice because of lower stocks and the availability of more California oranges for the fresh market. Nevertheless, domestic supplies will still be tight because of the prospect for moderately reduced carryin stocks. To meet domestic demand, imports will stay heavy. Thus, if demand remains relatively good, prices are not likely to weaken.

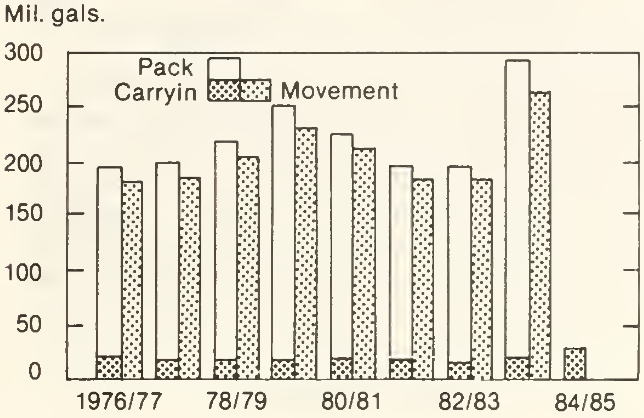
Because of the sharply smaller carryin stocks at the beginning of the season and relatively good demand, Florida packers processed 19 million gallons of frozen concentrated grapefruit juice (FCGJ) during 1983/84 (excluding reprocessed gallons), up 33 percent from last season. However, even with the sharply larger pack, reduced carryin stocks still resulted in a total supply moderately below last year's level. Despite higher prices, movement has been relatively good--amounting 20 million gallons through October 27, up slightly from a year earlier. F.o.b. prices have been steady at $3.25 a dozen 6-ounce cans (unadvertised brand, f.o.b., Florida canneries), compared with $2.47 last year. Despite the larger pack, the smaller carryin stocks and good movement still pushed stocks as of October 27 sharply below a year ago.

With a larger crop, the total pack of FCGJ for 1984/85 will be greater than 1983/84. However, 1984/85 supplies are not likely to rise considerably because of the smaller carryin stocks. If demand remains relatively strong, larger supplies are not likely to cause prices to fall appreciably.

Increased Pack of Chilled Citrus Juice Likely

During 1983/84, Florida packers processed 275 million gallons of chilled orange juice (excluding single-strength reprocessed), up 48 percent from 1982/83. The increase was caused entirely by the sharply increased quantities of frozen concentrates that were processed. Of the total chilled orange juice pack, 181 million gallons were processed from frozen concentrates, up 123 percent from last season. The remainder, 93 million gallons, came from fresh fruit and was down substantially. Reversing the downward trend, movement was strong throughout the season, despite higher prices. Even with strong movement, the larger pack caused ending stocks to be well above 1982/83.

Florida Supply and Movement of Chilled Orange Juice



Pack excludes single-strength reprocessed. Year beginning October.

Rising demand, combined with a larger crop and higher juice yield, will result in a larger pack of chilled orange juice in 1984/85. However, if movement remains strong, prices are likely to stay firm.

Florida packers also processed 28 million gallons of chilled grapefruit juice (excluding single-strength reprocessed), up 36 percent from 1982/83. Despite higher prices, movement was strong, up 29 percent from last season. The larger pack more than offset the increased movement and reduced carryin stocks, leaving chilled grapefruit stocks at the end of the season 22 percent above the previous season. With a larger crop and rising demand, the 1984/85 pack will be up. So, with larger carryin stocks and pack, the total supply will be adequate for market demand, but prices may remain high.

Substantially Smaller Pack of Canned Citrus Juice

The smaller citrus crop and increased demand for chilled and frozen juice resulted in a substantially lower Florida pack of canned citrus juice in 1983/84. The total pack of canned citrus juice amounted to 19.2 cases (24-2's), 13 percent below 1982/83.

The total pack of canned grapefruit juice, the leading item, continued to fall, off 18 percent from the previous season. Likewise, the total pack of canned orange juice was also smaller, off 7 percent from 1982/83. The higher prices resulted in sharply reduced sales. However, smaller carryin stocks and a reduced pack more than offset lower movement, leaving ending stocks of canned citrus juice well below last season. The larger 1984/85 crops of both oranges and grapefruit will not result in appreciably larger output of canned citrus juice. Prices may remain high.

FRESH NONCITRUS

The 1984 noncitrus crop—including major tree fruits, grapes, and cranberries—is forecast at 12.6 million tons, down fractionally from last year. The decline primarily reflects a moderately reduced grape crop. This summer's hot weather and thunderstorms in California reduced grape production. The pear crop is estimated to be 11 percent smaller, with a 14-percent reduction in winter pear production. The apple crop is down 1 percent from 1983. Consequently, fresh noncitrus fruit supplies will be lower this fall and winter, and prices are likely to be higher than a year ago.

Apples

Crop Down Fractionally

The final forecast of the 1984 U.S. apple crop places production at 8.23 billion pounds, down 1 percent from the August 1 forecast of 8.33 billion pounds and 1 percent less than last year's production. Since August 1, production prospects declined in the Central and Western States, but improved slightly in the East.

Crop prospects in the East indicate a larger output in most States, with a crop of 3.3 billion pounds, 2 percent above a year ago. However, New York, the leading apple State in the East, expects a crop of 1.06 billion pounds, off 4 percent from last year.

In the Central States, crop prospects, at 1.24 billion pounds, are up 4 percent. The increase is primarily attributed to Michigan, with a crop of 770 million pounds, up 3 percent, and Ohio, with a crop of 135 million pounds, up 35 percent.

Table 7.--U.S. noncitrus fruit: Total production, 1982, 1983, and indicated 1984

Crop	1982	1983	1984
	1,000 tons		
Apples	4,058	4,157	4,117
Apricots	114	95	124
Cherries, sweet	156	180	182
Cherries, tart	155	77	150
Cranberries	147	151	157
Grapes	6,554	5,494	5,019
Nectarines	178	186	170
Peaches	1,147	895	1,273
Pears	804	775	688
Prunes and plums	588	684	684
Total	13,901	12,694	12,564

SOURCE: Crop Production, SRS, USDA.

Table 8.--Apples: Regional production, 1982, 1983, and indicated 1984

Area	1982 1/	1983 1/	1984
	Billion pounds		
East	3.17	3.23	3.29
Central	1.47	1.19	1.24
West	3.48	3.89	3.70
Total U.S.	8.12	8.31	8.23

1/ Includes unharvested production and harvested not sold (million pounds): United States: 1982--13.8, 1983--21.1.

SOURCE: Crop Production, SRS, USDA.

Prospects in the Western States showed a mixed pattern, with an outturn of 3.7 billion pounds, 5 percent below 1983. Washington, the Nation's leading apple State, expects 2.85 billion pounds, down 5 percent. Washington apples are one to two sizes below last year, but color is good. At 490 million pounds, apple output in California, the second largest producing State in the West, is almost 7 percent larger than in 1983.

Market Prospects Good

Shipments of fresh apples are running well behind last year's pace because of the late harvest. The sharply reduced shipments so far are primarily caused by the slow movement of apples from Washington. Washington so far has provided only 40 percent of the total shipments, compared with 56 percent a year ago.

F.o.b. prices for fresh apples at major shipping points showed a mixed pattern, with strong prices in Washington. However, as the season progresses, apple prices are expected to decline. In late October, f.o.b. prices for Red Delicious apples in Wenatchee, Washington, were quoted at $13 a tray pack, size 88-113, U.S. Fancy, compared with $10.50 a year earlier. With a smaller crop in Washington and rising demand, prices for fresh apples are expected to stay relatively firm through this winter.

Processor demand for this year's apple crop is also likely to rise because carryover stocks of most canned apple products into this season are moderately below last year. Movement of apple products, particularly apple juice, has been strong and is expected to remain so during 1984/85. Good movement will encourage packers to process a large quantity of apples. Trade sources indicate that processors are likely to pack more canned apple products than last season.

With rising demand from packers, prices for processing apples have been negotiated at higher levels than last season. Many Michigan apple packers have agreed to pay $10 per cwt for Northern Spy (2-1/2 inches and up), compared with $8.50 a year ago. In the East, apples for U.S. No. 1 Canner Grade, size 2-3/4 inches and up in New York were offered at $6.90 per cwt, compared with $6.70 a year ago. As a result, prices of canned apple products are expected to remain firm.

Table 9.--Red Delicious Apples: Shipping point prices, selected regions, 1983 and 1984

Shipping points	Mid-October f.o.b. prices 1983	Mid-October f.o.b. prices 1984	Units
Western Michigan	7.50	7.13	Per carton, U.S. Fancy 2 1/4" up, 12-3 lb. film bags
Appalachian District	9.75	11.50	U.S. Comb. Extra Fancy and Fancy, tray pack, 88-113's
Yakima Valley, Washington	10.50	14.00	Per carton, tray pack, Wash., State Extra Fancy, 80-113's

SOURCE: F.o.b. prices, AMS, USDA.

Export demand will also be important to apple prices, but the export outlook is not very encouraging because of the strong U.S. dollar and larger crops in most West European countries. France, the leading exporting country, expects production to be up 23 percent from 1983. On the other hand, West Germany, a key importing country on the continent, is also expecting a 23-percent larger apple crop. Canada, our major customer, will harvest a relatively large crop. So far, early in the season, exports of fresh apples have shown good gains. However, the gains will slacken as the season progresses.

Retail prices of fresh apples have been well above a year ago. Nevertheless, prices dropped substantially in September, but they still remained moderately above a year earlier. As the season progresses, retail prices will decline further in the late fall and early winter. However, smaller supplies of early, mid-season, and navel oranges and winter pears will keep retail prices relatively firm through the winter.

Avocados

Sharply Larger Florida Crop

The 1984/85 crop of Florida avocados for certified shipment is forecast at 1.2 million bushels, 16 percent above the previous season. The crop will also be the largest since 1982/83.

Shipments through September totaled 479,700 bushels, compared with 347,900 last season. The volume of early season varieties is expected to be larger than in 1983/84, but winter varieties are forecast to yield amounts similar to the previous year.

The larger crop has weakened f.o.b. prices. For the week of October 22, shipping point prices for Florida avocados were quoted at $3.50 a flat carton (9-14's at Dade County), compared with $3.75 a year earlier. Prices may strengthen somewhat when supplies of California avocados decline seasonally, but they are expected to remain below a year earlier.

The shipment estimate for 1983/84, as reported by the California Avocado Commission, is 9.3 million bushels, up 15 percent from 1982/83. Shipments through September, at 9.18 million bushels, have already surpassed the previous season's total. Because of the larger crop, f.o.b. prices were significantly lower than a year earlier. With seasonally reduced supplies, prices have strengthened somewhat. Nevertheless, the season-average price will be below last year's $440 a ton.

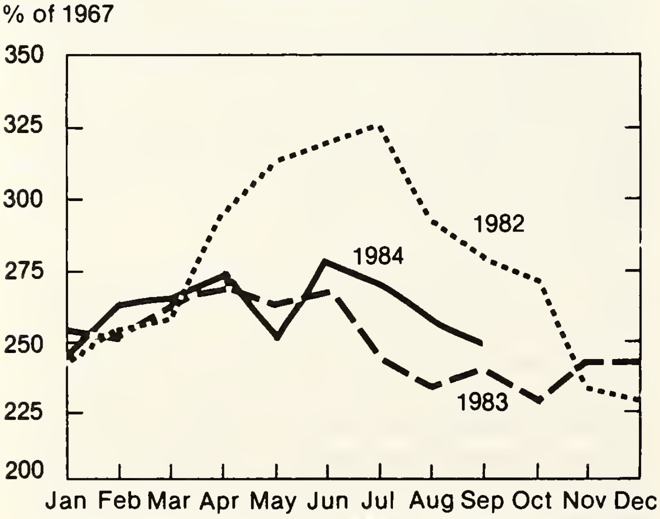
Bananas

Substantially Larger Imports

During the first 8 months of 1984, U.S. imports of bananas totaled 1.8 million metric tons, up 10 percent from a year earlier. Most of the increase was reported from Costa Rica, Ecuador, Colombia, and Nicaragua. Costa Rica still retains its position as the top supplier, with an increase of 17 percent from a year ago and one-fourth of total U.S. imports. Imports from Ecuador, the second leading supplier, recorded a 15-percent increase from a year ago. Imports from Colombia also increased sharply, up 56 percent. There was only a slight increase in imports from Nicaragua.

Wholesale prices of bananas this year have fluctuated between a low of $6.16 a 40-pound box in August and a high of $8.33 in June. Wholesale prices have been below a year ago since last April. The September price of $6.88 was 11 percent below a year earlier. Following lower wholesale prices, retail prices have also averaged below a year earlier since last April. The U.S. average retail price was 35 cents a pound in September, compared with 39.4 a year ago. With seasonally reduced supplies of fresh fruit, banana prices are likely to strengthen somewhat in the months ahead.

Bananas: BLS Consumer Price Index



Cherries

Sweet Cherry Crop Up

The 1984 U.S. sweet cherry crop totaled 182,400 tons, 2 percent more than in 1983. But in Washington, the leading producing State, the crop totaled 68,000 tons, down 24 percent from 1983. California moved to second place, as an outturn of 35,800 tons more than doubled 1983's level. Oregon, with a 33,000-ton crop—a decrease of 27 percent from 1983—dropped to a tie with Michigan for third place. The three Pacific Coast States accounted for 75 percent of the 1984 total. The Michigan crop, at 33,000 tons, was up 83 percent from a year ago.

Because of the larger crop and increased competition from bigger supplies of fresh summer fruit, grower prices for 1984 fresh sweet cherries averaged $704 a ton, compared with $766 in 1983. The larger crop, combined with increased carryover stocks, also weakened grower prices for processing sweet cherries, to $381 a ton from $429 in 1983. Overall, prices for sweet cherries for all sales averaged $556 a ton, compared with $617 in 1983.

Of 1984's utilized production, 54 percent was sold fresh and 46 percent was processed. However, lower uses were reported for all outlets except brining. Consequently, sweet cherries used for brining accounted for 32 percent of the total crop, compared with 27 percent in 1983. Larger supplies of other summer fruit caused reduced sales to the fresh market, down 4 percent from a year ago. Use of sweet cherries for canning was down 15 percent, while use for frozen items, juice, jelly, etc. was down 23 percent. The following table shows the use of the U.S. sweet cherry crop during the last 4 years.

Tart Cherry Production Sharply Larger

U.S. production of tart cherries totaled 299.7 million pounds, almost double the small 1983 crop. The four Great Lake States produced 95 percent of the total, 286 million pounds, compared with 123 million in 1983. Michigan, the leading tart cherry State, produced 240 million pounds, nearly three times the 87 million of 1983. New York, which is the second largest producer, had a crop of 26 million pounds, up 13 percent from last year. Increased production was also estimated for Pennsylvania and Wisconsin, while the Western States showed drastically decreased production.

Because of the dramatically larger crop, grower prices for 1984 averaged 24.7 cents a

Table 10.--Sweet cherries: Production, use, price, and value, 1981-84 crops

Crop	Production 1/		Uses				Price per ton	Value of used production
	Total	Used 2/	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other 3/		
	1,000 short tons						Dollars	1,000 dollars
1981	153.0	146.0	70.2	10.3	55.0	10.5	683	99,792
1982	155.7	133.7	66.7	10.7	45.8	10.5	694	92,738
1983	179.7	167.3	93.5	11.1	45.3	17.4	617	103,267
1984	182.4	165.4	89.6	9.4	53.0	13.4	556	91,889

1/ Difference between total and used is quantities harvested but not sold and quantities not harvested. 2/ Some totals do not add because of rounding. 3/ Includes frozen, juice, jelly, etc.

SOURCE: Crop Production, SRS, USDA.

Table 11.--Tart cherries: Production, use, price, and value, 1981-84 crops

Crop	Production 1/		Uses				Price per ton	Value of used production
	Total	Used 2/	Fresh	Processed (fresh equivalent)				
				Canned	Frozen	Other 3/		
	1,000 short tons						Dollars	1,000 dollars
1981	66.6	66.4	2.0	19.6	43.8	1.1	890	59,060
1982	155.5	122.5	3.7	35.7	80.4	2.7	282	34,645
1983	77.3	76.8	2.7	18.7	52.6	2.9	932	71,506
1984	149.9	139.5	3.5	46.6	87.6	1.9	494	68,782

1/ Difference between total and used is quantities harvested but not sold and quantities not harvested. 2/ Some totals do not add because of rounding. 3/ Includes juices, wine, jam, etc.

SOURCE: Crop Production, SRS, USDA.

pound, down from last year's 46.6 cents. However, with the larger production, the crop is valued at $69 million, down only 4 percent from 1983.

The larger crop resulted in increased use for all outlets except those for freezing, juice, jelly, etc. The following table shows the use of tart cherries during the last 4 years.

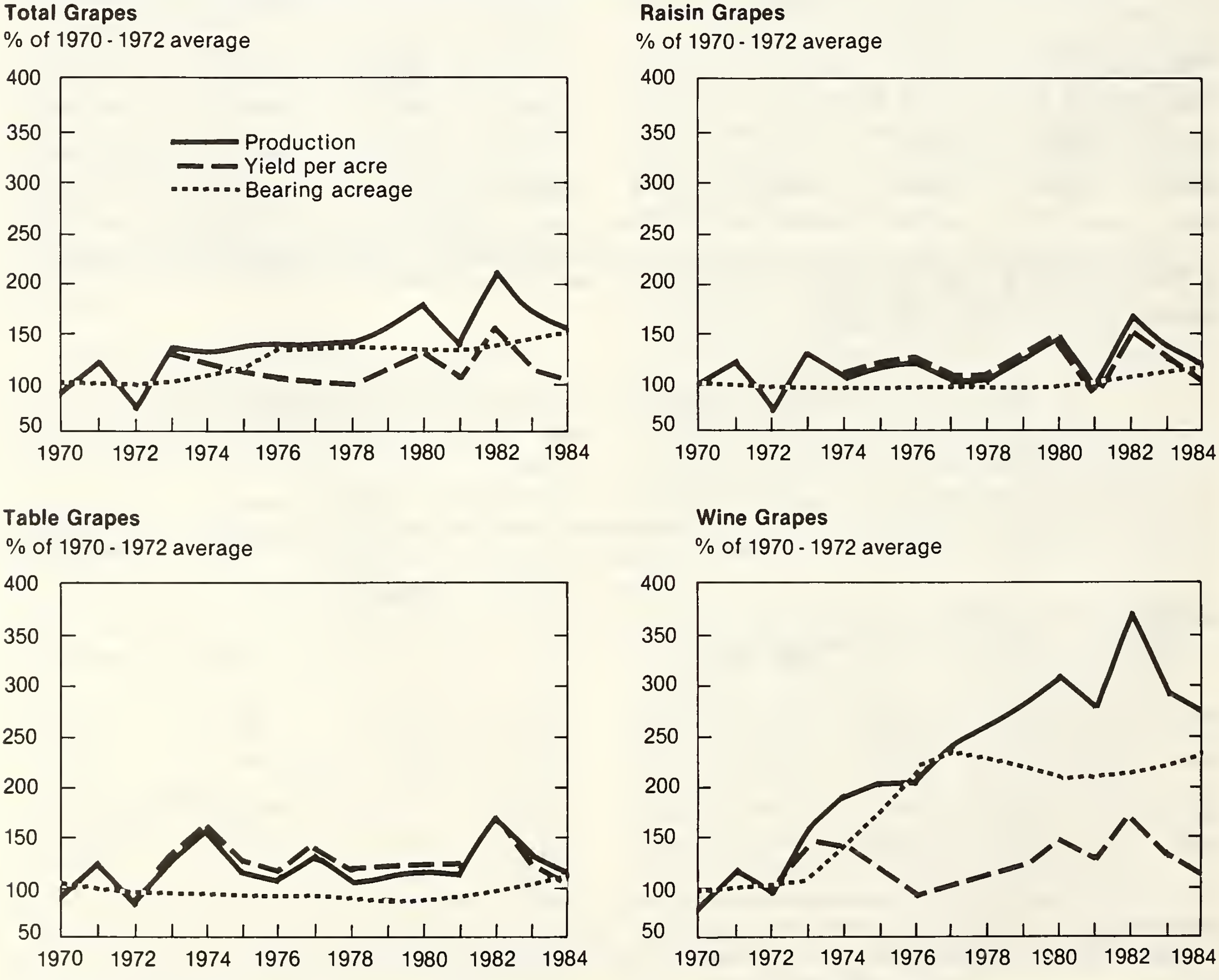
Grapes

Substantially Smaller Grape Crop Forecast

The final forecast of the 1984 U.S. grape crop is 5.02 million tons, 9 percent below last year. Prospects in California point to a crop of 4.48 million tons, compared with 4.91 million last year. However, the California grape crop still accounts for 89 percent of the U.S. total, the same as 1983.

California's raisin-variety grapes, at 2.25 million tons, are forecast 11 percent below 1983. The output of wine-variety grapes, at 1.8 million tons, is 4 percent less than was produced in 1983. Excellent grape quality has been reported for most varieties. California's table-variety grapes, 430,000 tons, are projected 13 percent below last year, but the overall quality of the crop has been very good. Although the 1984 bearing acreage for all three varieties is currently estimated above 1983, the extremely hot weather

California Grapes: Acreage, Yield, and Production



1983 preliminary. 1984 indicated.

Table 12.--Grapes: Total production and season-average prices received by growers in principal States, 1982, 1983, and indicated 1984 production

State	Production 1/			Price per ton 2/	
	1982	1983	1984	1982	1983
		Tons		Dollars	
New York	157,000	191,000	195,000	234.00	226.00
Pennsylvania	47,000	62,500	60,000	225.00	170.00
Ohio	9,000	11,500	12,000	227.00	199.00
Michigan	58,500	60,000	48,000	201.00	194.00
Missouri	2,500	3,600	4,100	320.00	349.00
North Carolina	4,500	3,000	6,000	321.00	324.00
Georgia	2,800	2,500	2,900	473.00	534.00
South Carolina	2,400	1,500	2,500	289.00	303.00
Arkansas	10,500	10,000	10,000	238.00	252.00
Arizona	15,100	14,600	13,600	991.00	1,050.00
Washington	168,900	227,000	185,000	185.00	152.00
California:					
Wine	2,402,000	1,880,000	1,800,000	218.00	209.00
Table	612,000	497,000	430,000	344.00	354.00
Raisin 4/	3,062,000	2,530,000	2,250,000	218.00	158.00
Dried 5/	292,000	394,000	--	1,153.00	587.00
Not dried	1,112,000	619,000	--	214.00	237.00
All	6,076,000	4,907,000	4,480,000	231.00	199.00
United States	6,554,200	5,494,200	5,019,100	232.00	200.00

1/ Includes unharvested production and harvested not sold (tons): U.S. 1982--690,200, 1983--146,500. 2/ Price derived from unrounded data for California all varieties and raisin varieties. 3/ Fresh equivalent of dried and not dried. 4/ Dried basis, 1 ton of raisins is equivalent to 5.24 tons of fresh grapes for 1982 and 4.48 tons for 1983.

SOURCES: Production, Crop Production and Prices, Noncitrus Fruits and Nuts Mid-Year Supplement, SRS, USDA.

generally reduced production. Trends for bearing acreage, production, and yield per acre for California grapes, by variety, are shown in the following chart.

Reflecting smaller crops in several major producing States, total grape production in States other than California is now estimated at 539,100 tons, down 8 percent from 1983. Washington, with a crop of 185,000 tons, is posting a drop of 19 percent from 1983. The Pennsylvania crop, at 60,000 tons, is 4 percent below last year. At 48,000 tons, the Michigan crop is 20 percent less than in 1983. In contrast, New York's forecast of 195,000 tons is 2 percent above last year.

Market Prospects and Prices Vary

Despite a smaller crop, shipments of fresh table grapes totaled 890 million pounds through October 27, up 5 percent from a year earlier. In response to good demand and seasonally reduced supplies, f.o.b. prices have strengthened. By late October, Emperors were quoted at $8.50 a 23-pound lug in the Central San Joaquin Valley, California, compared with $6 a year earlier. Although supplies of table grapes for the fresh market will likely be larger this year because of the expected weak market for competing uses of multipurpose varieties, good demand will probably hold prices relatively firm. The 1984 average grower price for fresh use is projected to be above 1983.

Through late October, handlers received 234,816 tons of raisins, compared with 283,516 a year earlier. Nevertheless, the output of raisins will probably be relatively large. Grower prices for raisin-variety grapes are likely to average below last year's levels in view of burdensome raisin supplies.

The slower growth in wine shipments and larger supplies of raisins have resulted in a mixed pattern of grower prices for wine grapes. Prices vary greatly among producing areas, supplies, and varieties of grapes.

Larger Crush Expected

The amount of California grapes crushed for wine through October 20 totaled 2.5 million tons (fresh basis), compared with 2.2 million a year ago. The largest increase was recorded for raisin-variety grapes, which accounted for 23 percent of crusher receipts, compared with 15 percent a year ago. The increased crush of raisin-variety grapes was probably caused by the burdensome carryover stocks of raisins and the fact that wine-variety grape yields were low both this year and last year. Thus, the total quantity of grapes crushed for wine in 1984 exceeds last year.

This year's smaller crops in States other than California--especially Washington--are expected to cause a moderately decreased crush of Concord and other American-type grapes.

California wine shipments to all markets continue to grow at a slow rate. Shipments for the first 8 months of 1984 were only slightly higher than a year earlier. In contrast, foreign wine shipments registered a nearly 8-percent gain during the first 7 months of 1984. Consequently, sluggish domestic shipments have held wine prices steady. The BLS Consumer Price Index for all wines during the first 9 months of this year averaged slightly below a year ago. With weak grower prices for wine grapes and larger imports of foreign wines, wine prices are expected to remain relatively steady.

On October 30, President Reagan signed the Wine Equity Act, which is aimed at boosting wine trade for U.S. producers and gives grape growers a chance to seek relief from wine imports. The act targets mostly wine imports from the European Community (EC) and barriers to U.S. wine exports to Japan.

Pears

Crop Down Substantially

The final forecast of the U.S. pear crop is 687,500 tons, down 11 percent from 1983. Output of Bartlett pears in California, Oregon, and Washington is forecast at 411,000 tons, 11 percent less than 1983. California's Bartlett pear production is forecast at 275,000 tons, 6 percent above last year's crop. The quality of the crop is reported to be excellent, with no resetting problems. Harvest was completed in mid-September. Sugar content and solids are reported to be unusually high due to the hot summer. The Bartlett crop is forecast down 35 percent in Oregon and 33 percent in Washington.

Production of Pacific Coast pears other than Bartletts is forecast at 232,500 tons, 14 percent less than last year's crop. The California crop is estimated at 9,500 tons, up 16 percent from 1983. The crop is larger and of higher quality than last year. However, reduced crops are estimated for both Oregon and Washington, which are the principal suppliers of pears for the winter and spring fresh markets.

Higher Prices Expected

The smaller crop has pushed shipments of fresh Bartletts moderately below a year ago. F.o.b. prices for fresh Bartletts have been substantially higher than a year ago, and they jumped as the end of the season approached. In early October, the f.o.b. price quotation for Bartlett pears at Lake County, California, was $12.50 a box, U.S. No. 1, size 90-135, compared with $10.25 a year ago.

However, f.o.b. prices were much higher in Washington. Prices for Washington Bartlett

Table 13.--Pears: Shipping point prices, selected regions 1983 and 1984

Shipping points	Mid-October f.o.b. prices		Units
	1983	1984	
Lake County Dist., California: 1/ Bartlett	6.50	12.20	U.S. No. 1, std. box wrapped pack, 90-135's
Yakima Valley, Washington: Bartlett	14.00	16.50	U.S. No. 1, std. box wrapped pack, 90-135's

1/ For week ending, 1983 October 18 and 1984 October 1.

SOURCE: F.o.b. prices, AMS, USDA.

pears at Yakima Valley averaged $17 a box (U.S. No. 1, size 90–135) on October 29, up 21 percent. The smaller crop and rising processor demand are the primary contributors to higher prices. Prices for winter pears are also expected to be strong in light of a sharply reduced crop and less competition from smaller apple production. In late October, f.o.b. prices for D'Anjou in Yakima Valley, Washington, were reported at $13 a carton, up from $12 a year ago.

Depleted carryover stocks of canned pears have caused higher prices for Bartletts for canning. California growers and canners have agreed on a field price of $175 a ton for first grade 1–A Bartletts (defined as 2–3/8 inches and meeting a maturity pressure of 15 pounds), compared with $135 last year. The field price has been settled in the Northwest at a cash price of $187.50 a ton for No. 1 grade Bartletts. This compares with a cash price of $122.50 and a deferred price of $130 last year. Thus, higher producer prices and smaller supplies are expected to show up in the prices of canned pears at all levels.

Export Prospects Unfavorable

During the first 2 months of 1984/85 (through August), exports of fresh pears totaled 4,106 metric tons, up 2 percent from a year ago. Canada, the United States' largest customer, increased its purchases 4 percent. In contrast, purchases from Latin American showed a sharp drop. Prospects for U.S. exports of fresh pears during 1984/85 do not look favorable because of reduced supplies, higher prices, and the strong U.S. dollar.

PROCESSED NONCITRUS

Supplies of processed noncitrus fruit will be mixed during 1984/85. Even though the canned fruit pack is expected to be up for some items, depleted stocks will still result in small supplies for most canned fruit. Consequently, prices are expected to remain firm. In contrast, supplies of dried fruit, particularly raisins and prunes, will be adequate to ample; raisin prices will be lower than a year ago.

The total supply of frozen fruit and berries will be ample, particularly tart cherries and strawberries. Supplies of most other frozen fruit and berries are adequate this season. Consequently, these large supplies and the lower cost of fruit and berries will keep prices weak.

Canned Fruit Pack Mixed

The 1984/85 pack of some canned noncitrus fruit will be moderately or sharply above last year. However, total supplies of canned items will still be small, reflecting depleted carryin stocks for most fruit.

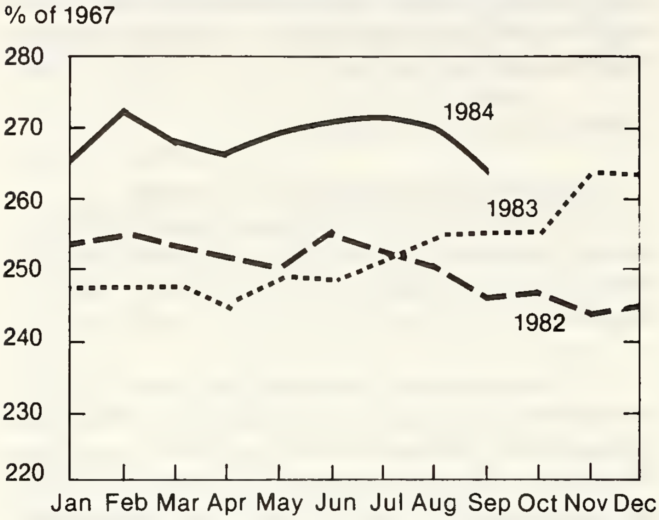
A trade source indicates that the unaudited pack of canned Clingstone peaches totaled 18.7 million cases (No. 24/2 1/2's), up 75 percent from last year. A moderately increased pack of canned fruit cocktail––8.8 million cases (No. 24/2 1/2's)––was also reported. The canned mixed fruit pack amounted to 2.3 million cases (No. 24/2 1/2's), up 75 percent from last year. Deliveries of California Bartlett pears for canning were up moderately from a year earlier, while total Bartlett tonnage for canning in Oregon and Washington is currently estimated to be well below last year.

Because of the larger crop in Michigan, the leading cherry–producing State, the total pack of canned tart cherries is expected to be sharply above last year. The tonnage of Michigan sweet cherries for canning was also up significantly from 1983.

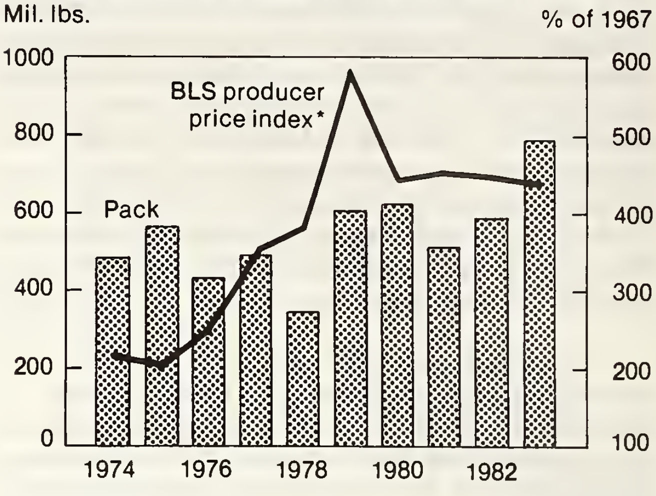
In contrast, according to the Northwest Food Processors Association, Northwest canners packed 197,631 cases (24–2 1/2's) of dark sweet cherries, down 18 percent from last year. The 1984 pack of canned light sweet cherries totaled 65,287 cases (24–2 1/2's), down 50 percent. Nevertheless, the overall pack of canned red tart cherries is likely to be well above 1983, but that of canned light sweet cherries is down. Thus, even with smaller carryin stocks of canned tart cherries and larger stocks of canned sweet cherries, overall supplies of canned cherries should be adequate to ample. With the record plum crop in California, the 1984 canned purple plum pack should be larger than last year.

The larger apple crops from the Eastern and Central States will increase the canned apple–product pack. In addition, rising demand for canned apple juice will also direct

Canned Fruit: BLS Producer Price Index



U.S. Raisin Pack and Producer Price Index



*15 oz. packages.

more apples for processing use. However, total supplies of canned apple items are not expected to increase appreciably because of a reduced carryover. Packers are aggressively bidding up prices to levels that are moderately higher than a year ago. So, good demand and increased prices for processing apples will strengthen prices for canned apple items during 1984/85.

In view of small supplies and higher costs of fruit, prices of canned fruit at all levels will remain firm this season. The BLS September producer price index for canned fruit, at 264 (1967=100), was almost 4 percent higher than a year ago. Price hikes for most canned fruit have recently been announced by packers.

Dried Fruit Supplies Adequate

Although the California grape crop is moderately smaller, output of raisins this season could still be relatively large. At present, the trade is forecasting a total raisin output of 325,000 tons, down substantially from 1983. Even with the smaller production, heavy carryin stocks will still result in large supplies of raisins during 1984/85. The heavy supplies have caused the field price for natural seedless raisins to settle at $700 a ton, down significantly from last year. Consequently, raisin prices will be lower in response to lower field prices and heavy supplies. The BLS September producer price index for raisins was 357 (1967=100), down 30 percent from a year earlier and the lowest since August 1978.

Demand for raisins abroad has improved somewhat, particularly in the EC. Although total exports of U.S. raisins during the 1983/84 marketing year were down moderately from 1982/83, shipments to EC recorded a 28-percent increase. During the first 2 months of 1984/85, raisin shipments were strong, with domestic movement up 24 percent and exports up 64 percent from a year ago. Reduced prices for U.S. raisins and lower output in several major producing countries could enhance foreign demand. In addition, the USDA's approval of the second $5 million to support export promotion of California raisins in Western Europe will probably further strengthen the markets there. A good economy and lower prices will probably continue to strengthen domestic demand.

The Raisin Administrative Committee has computed preliminary free and reserve percentages of 53 and 47, respectively, for this year's natural seedless raisins. To alleviate burdensome supplies, the industry proposed to ask USDA to amend the Federal marketing order for California raisins in order to permit a voluntary producer diversion program to reduce the quantity of raisin grapes grown for drying into raisins. More details on the amendment will be announced later on.

Production of dried prunes, the other major dried fruit, is currently estimated at 134,400 tons (natural conditions), down 4 percent from 1983. With fractionally smaller carryin stocks, the total supply of dried prunes for 1984/85 is estimated at 183,667 tons, down 3 percent from last year, according to the Prune Administrative Committee.

Early season shipments of dried prunes through September were down 12 percent from last year because smaller deliveries to domestic markets more than offset larger exports. Exports recorded a 14-percent increase, primarily reflecting shipments to Italy, which more than doubled its purchases compared with a year earlier. However, export demand is not likely to be bright because France, a major producing country, expects a near-record crop this year. The September BLS producer price index for dried prunes stood at 254.8 (1967=100), slightly above a year ago.

Frozen Fruit and Berry Pack Will Vary

The 1984 pack of frozen fruit and berries will vary this season. Lower grower prices reduced deliveries of strawberries to freezers, as more strawberries are sold fresh at higher prices. Freezers in California, the leading State, have received 146.2 million pounds of strawberries through October 20, down 15 percent from a year earlier. However, U.S. imports of frozen strawberries from Mexico through September 15 totaled 50.5 million pounds, an increase of 25 percent from last season. Deliveries of strawberries to freezers in Oregon and Washington this season showed decreases from last year.

Freezers' receipts for blackberries were up slightly in Washington, but down in Oregon. Deliveries of blueberries to freezers in Oregon and Washington have indicated sharp declines. Likewise, deliveries of blueberries to freezers in Michigan, the leading State, through September 15 also showed a sharp decrease, totaling 21.7 million pounds, compared with 34.6 million last year.

Reflecting a sharply larger crop, a total of 175.2 million pounds of tart cherries were used for freezing, compared with 105.2 million in 1983. Even with smaller carryin stocks, total supplies of frozen tart cherries are heavy.

Cold Storage Stocks Up

As of October 1, cold storage holdings of frozen fruit and berries totaled 701 million pounds, up 12 percent from a year ago. Sharply increased supplies of frozen cherries contributed the most to the increase. Frozen tart cherries in cold storage totaled 119 million pounds, up 59 percent from a year ago. Even with the smaller strawberry output, larger carryin stocks and imports have resulted in 12 percent more cold storage holdings of frozen strawberries. Demand for frozen fruit and berries will likely stay relatively good, but the ample supplies, coupled with lower costs for crops, should weaken prices.

Table 14.--Stocks of frozen fruit:
End of September 1981-84

Frozen fruit	1981	1982	1983	1984
	1,000 pounds			
Apples	39,968	30,641	36,869	31,312
Apricots	9,160	12,831	10,816	13,103
Blackberries	26,420	21,647	17,136	21,253
Blueberries	38,763	39,599	69,027	64,024
Boysenberries	4,937	8,032	3,481	3,373
Cherries 1/	86,849	116,234	90,271	136,469
Grapes	3,405	6,135	4,001	6,240
Peaches	58,402	55,455	51,807	63,482
Raspberries, Red	22,582	30,251	31,563	37,981
Strawberries	171,845	178,902	220,705	231,018
Other frozen fruits	100,740	106,292	89,493	93,027
Total frozen fruits	563,071	606,019	625,172	701,282

1/ Includes both sweet and tart cherries.

SOURCE: Cold Storage, SRS, USDA.

BERRIES

Cranberries

Record Crop Expected

The 1984 U.S. cranberry crop is expected to be a recond 3.14 million barrels (142,000 metric tons), up 4 percent from the previous record set in 1983 and 7 percent more than the 1982 crop. Increased production is forecast for all States, except Washington. At 1.48 million barrels, Massachusetts, the leading State, will harvest a crop that is 1 percent larger than 1983. Production in Wisconsin, the second largest cranberry State, is forecast at 1.2 million barrels, up 6 percent from 1983. Combined production for these two States will account for 85 percent of the crop, compared with 86 percent last year.

Because of a larger crop, shipments have been running well ahead of last year's pace. Season-opening prices for fresh cranberries from Massachusetts in the Chicago wholesale market were moderately higher than a year earlier. As the season has progressed, prices have declined. As of October 30, prices were quoted at $14 a carton (12-ounce filing bag), compared with $14.50 a year earlier. Prices for Wisconsin cranberries in the Chicago wholesale market were substantially below last year in response to a larger crop. Even with a recond crop, good demand is likely to keep prices relatively firm.

TREE NUTS

Supplies of tree nuts will be plentiful during 1984/85. A record almond crop is forecast, and filbert production is estimated to be 71 percent greater than last year. The walnut crop is expected to be 13 percent larger, but the pecan crop will be 7 percent below last year. Prices of almonds and pecans are expected to fall below last year, but those of filberts and walnuts may be near year-earlier levels.

Almonds

Alltime-High Production

The 1984 California almond crop was forecast at a record 520 million pounds, shelled basis, up 117 percent from the 1983 weather-reduced outturn. The continued expansion in almond production reflects a steady upward trend in bearing acreage and increased yield per acre. The 1984 average set per tree was 9,216 nuts, compared with 7,598 for the previous record harvest in 1981. California bearing acreage in 1984 is currently estimated at 370,000, up from 356,223 in 1983.

According to the Almond Board of California, so far this season (July 1–

Table 15.--Tree nuts: Production in principal States, 1982, 1983, and indicated 1984

Crop and States	1982	1983	Indicated 1984	Crop and States	1982	1983	Indicated 1984
		1,000 pounds shelled basis				Short tons in-shelled basis	
Almonds:				Pecans:			
California	347,000	240,000	520,000	North Carolina	1,900	1,600	2,900
				South Carolina	2,200	1,500	5,500
		Short tons in-shelled basis		Georgia	125,000	100,000	125,000
				Florida	4,500	3,400	5,000
				Alabama	23,000	24,000	18,000
Filberts:				Mississippi	4,000	8,000	5,000
Oregon	18,400	8,000	13,700	Arkansas	500	2,500	2,000
Washington	400	200	300	Louisiana	10,000	22,000	10,000
2 States	18,800	8,200	14,000	Oklahoma	2,000	8,000	25,000
				Texas	17,000	70,000	25,000
Macadamia nuts:				New Mexico	25,000	29,000	27,000
Hawaii	18,360	18,210	NA	Total	215,100	270,000	250,400
Pistachios:							
California	21,700	13,200	NA	Improved varieties 1/	168,200	167,250	181,100
Walnuts, English:							
California	234,000	199,000	225,000	Native and seedling	46,900	102,750	69,300
				Total 5 tree nuts 2/	507,960	508,610	3/489,400

1/ Budded, grafted, or topworked varieties. 2/ Excludes almonds. 3/ Excludes Macadamia nuts and pistachios. NA = Not available.

SOURCE: Crop Production, SRS, USDA.

September 30), domestic shipments of almonds totaled 29.5 million pounds, down 12 percent from a year earlier. Primarily reflecting bigger shipments to the Soviet Union and West Germany, almond exports amounted to 57.7 million pounds, 16 percent more than a year earlier. Consequently, exports accounted for 66 percent of total shipments, compared with 60 percent a year earlier. Shipments to Japan recorded a 31-percent reduction, while purchases from West Germany showed sharp gains. Nearly 5.6 million pounds of almonds have been shipped to the Soviet Union this season, up from nothing a year ago. Export prospects are promising in view of the record California crop and reduced supplies from Spain. With lower prices and relatively good demand, the outlook for the domestic market will improve.

With a record crop, a major California almond handler recently announced an across-the-board price reduction of approximately 20 to 25 percent from last year. Demand is a key factor for this season's almond prices. However, establishment of a 25-percent reserve by the Secretary of Agriculture under authority of the marketing order probably moderated the price decline. Nevertheless, the 1984 average price received by California almond growers is expected to be below the $1.16 a pound for the 1983 crop.

Filberts

Significantly Larger Crop

The 1984 filbert crop in Oregon and Washington is forecast at 14,000 tons, 71 percent greater than last year, but still 25 percent below the 1982 crop. The Oregon crop, at 13,700 tons, is up 71 percent and accounts for 98 percent of U.S. output. Washington production is estimated at 300 tons, 50 percent larger than 1983.

Foreign output in the major producing countries is expected to show sharp declines. Turkey, the leading producer, expects a crop of 300,000 tons (in-shell basis), down 29 percent from last year's record crop. Italy, the second largest producer, expects to harvest 90,000 tons, down one-fourth from 1983, while Spain will have a 42 percent smaller crop. Smaller crops are forecast in these three countries because of the normal downturn in the production cycle after an exceptionally large harvest last season. Nevertheless, quality and kernal size are reported normal. Consequently, total world commercial production will be 17 percent below 1983. However, smaller world production is not likely to boost grower prices appreciably for U.S. filberts because of heavy supplies of U.S. almonds.

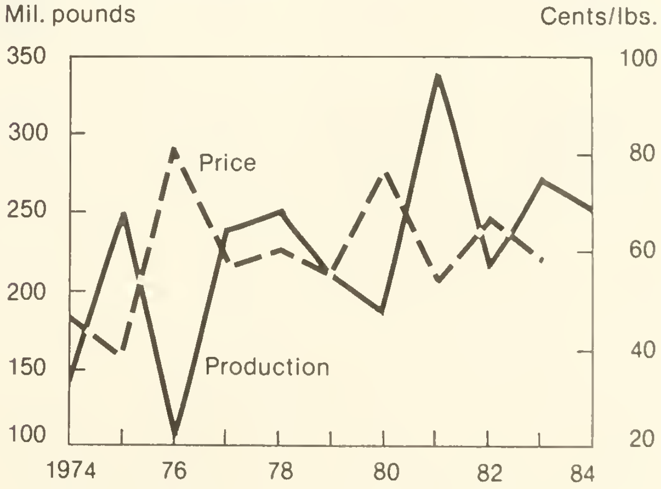
U.S. imports of filberts, mostly from Turkey, for the season through July totaled 3,607 metric tons, up 22 percent from a year ago. Imports from Turkey accounted for 82 percent of the total. With a larger crop and increased competition from lower priced almonds, imports of filberts are likely to fall somewhat during 1984/85.

Pecans

Moderately Reduced Crop Expected

The October 1 forecast of the U.S. pecan crop places production at 250.4 million pounds (in-shell basis), 7 percent below last year. The smaller production is mainly caused by reduced crops in Alabama, Louisiana, and Texas. The Texas forecast, at 25 million pounds, is down from 70 million in 1983. The crop in Louisiana is forecast at 10 million pounds, 55 percent below 1983, and Alabama's crop is estimated at 18 million pounds, down one-fourth. Larger crops are indicated for Georgia, Oklahoma, and South Carolina. But these are only partially offsetting the decrease.

U.S. Pecan Production and Prices Received by Growers



Georgia, the leading producer, expects to harvest 125 million pounds, 25 percent more than in 1983. Oklahoma's crop is expected to reach 25 million pounds, almost three times as large as the previous year's production. The crop in South Carolina is estimated at 5.5 million pounds, compared with only 1.5 million in 1983.

The reduced total production is due exclusively to the much smaller native and seedling crops. Consequently, the native and seedling crops account for 28 percent of the U.S. total, compared with 38 percent last year.

The carryover was moderately larger than a year ago. Thus, the total supply of pecans will still be relatively large, even with a smaller crop. Consequently, the large supplies, combined with bigger crops of almonds and walnuts, are not likely to strengthen pecan prices appreciably. Prices received by U.S. pecan growers in 1983 averaged 58.7 cents a pound for all varieties.

Walnuts

Sharply Larger Production Expected

As of September 1, the California walnut crop was forecast at 225,000 tons, in-shell basis, 13 percent more than last year's production. The average set per tree is the highest ever recorded, while in-shell weight per unit is the lowest on record. Record-high temperatures this summer concerned growers, but apparently the heat caused only minimal damage. Sunburn, brush fly, and codling moth problems were also minor.

The 1984/85 marketing year got off to a fast start; shipments of in-shell walnuts were well above last year, while those of shelled walnuts were fractionally less than a year ago during the first 2 months of 1984/85 (August and September). According to the Walnut Marketing Board, approximately 14 million pounds of in-shell walnuts were shipped, up 56 percent from a year ago. The entire increase is attributable to dramatically larger exports. Major U.S. customers are West Germany, Italy, and the Netherlands, and expected smaller crops in France, Italy, and Turkey will enhance U.S. exports.

Shipments of shelled walnuts during the first 2 months of 1984/85 totaled 24.7 million pounds, down fractionally from the previous season. Most shipments are for the domestic market, almost the same amount as a year ago. However, exports---although a very small quantity---dropped 15 percent from a year earlier.

Even with a larger crop, the total supply of walnuts is not up appreciably because of significantly reduced carryin stocks. If export demand remains strong, the smaller pecan crop may help maintain walnut prices. The 1983 average price was $631 a ton.

The Walnut Marketing Board recommended to the Secretary of Agriculture that 76 percent of the 1984 California walnut crop be made available to the U.S. market and 24 percent be held in reserve for export.

Table 16.--Seven citrus fruits: Production, use, and value, United States, 1981/82-1983/84 1/

Fruit and season	Production 2/	Use of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
	1,000 short tons		Percent	1,000 short tons	Percent	1,000 dollars
Oranges:						
1981/82	7,600	1,817	23.9	5,783	76.1	1,167,795
1982/83	9,519	2,323	24.4	7,196	75.6	1,317,139
1983/84	7,238	1,870	25.8	5,368	74.2	1,216,314
Grapefruit:						
1981/82	2,878	1,158	40.2	1,720	59.8	229,038
1982/83	2,447	1,286	52.6	1,161	47.4	185,188
1983/84	2,144	1,001	46.7	1,143	53.3	208,057
Lemons:						
1981/82	942	401	42.6	541	57.4	105,688
1982/83	963	442	45.9	521	54.1	111,286
1983/84	807	439	54.4	368	45.6	115,478
Limes:						
1981/82	52	25	48.1	27	51.9	16,170
1982/83	68	39	57.4	29	42.6	22,255
1983/84	60	33	55.0	27	45.0	17,504
Tangelos:						
1981/82	229	80	34.9	149	65.1	27,865
1982/83	171	85	49.7	86	50.3	24,102
1983/84	162	72	44.4	90	55.6	20,050
Tangerines:						
1981/82	212	135	63.7	77	36.3	40,728
1982/83	229	142	62.0	87	38.0	43,034
1983/84	200	128	64.0	72	36.0	36,526
Temples:						
1981/82	144	38	26.4	106	73.6	18,862
1982/83	211	70	33.2	141	66.8	28,056
1983/84	130	34	26.2	96	73.8	20,100
Total:						
1981/82	12,057	3,654	30.3	8,403	69.7	1,606,146
1982/83	13,608	4,387	32.2	9,221	67.8	1,731,060
1983/84	10,741	3,577	33.3	7,164	66.7	1,634,029

1/ Preliminary. 2/ Production having value.

SOURCE: Citrus Fruits, SRS, USDA.

Table 17.--Selected citrus fruit: Used for processing by percentages of total production, 1976/77-1983/84

State, variety, and season	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84 1/
					Percent			
Oranges:								
Florida								
Temple	68.8	58.2	54.6	53.6	69.3	73.8	66.7	73.7
Early and midseason	94.7	93.5	93.0	94.5	94.5	93.3	91.4	92.9
Valencia	96.2	94.7	92.6	94.9	96.3	94.8	93.9	94.3
Total	95.2	94.1	92.9	94.7	95.2	93.9	92.6	93.5
California								
Navel and miscellaneous	24.7	24.0	31.3	33.4	37.0	20.0	32.3	24.6
Valencia	32.5	39.8	36.4	33.7	50.2	20.8	55.3	16.7
Total	28.1	32.4	33.5	33.5	42.3	20.3	43.2	22.2
Grapefruit:								
Florida								
Seedless	61.5	58.2	53.8	58.6	60.2	60.3	47.1	54.2
Pink	47.8	37.6	28.3	33.6	39.0	43.3	27.6	32.7
White	67.2	68.9	65.4	71.4	71.1	69.5	58.5	66.8
Other seeded	99.3	99.0	99.0	98.7	99.1	100.0	100.0	100.0
Total	68.2	64.9	60.4	64.4	65.9	65.2	53.5	59.3
Texas	47.7	44.5	55.6	46.8	30.6	48.0	30.4	10.6
Tangerines:								
Florida	29.8	40.6	46.0	40.0	36.5	36.4	33.8	29.8
California	33.0	41.4	34.5	52.4	59.1	35.3	47.0	50.3
Lemons:								
California	47.6	51.2	35.0	48.5	62.3	56.9	54.4	46.4
Arizona	58.2	60.3	49.1	48.0	68.0	59.0	52.9	42.0

1/ Preliminary.

SOURCE: Citrus Fruits, SRS, USDA.

Table 18.--Florida oranges used for frozen concentrate, 1981/82-1984/85

Season	Florida orange and Temple production	Used for frozen concentrates 1/		Yield per box 2/
	Million boxes		Percent	Gallons
1981/82	129.0	105.2	81.6	1.28
1982/83	144.3	114.6	79.4	1.48
1983/84	119.6	94.0	78.6	1.29
1984/85	122.7	NA	NA	1.46

1/ Includes tangelos, Temples, tangerines, and K-early citrus. 2/ Gallons per box at 42.0 degrees brix equivalent. NA = Not available.

SOURCES: Crop Production Citrus Fruits, SRS, USDA, and Florida Citrus Processors Association.

Table 19.—Citrus fruit: Season-average equivalent returns per box received by growers, by variety and use, by State and total United States, 1982/83-1983/84

Variety, States, and U.S.	1982/83						1983/84					
	Equivalent P.H.D. 1/			Equivalent on-tree			Equivalent P.H.D. 1/			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
							Dollars					
ORANGES:												
Florida												
Early and midseason	6.58	8.75	6.38	4.88	7.05	4.68	5.68	8.75	5.45	3.88	6.95	3.65
Valencia	7.11	6.05	7.18	5.41	4.35	5.48	8.36	11.45	8.17	6.56	9.65	6.37
All	6.85	7.64	6.78	5.15	5.94	5.08	6.76	9.70	6.55	4.96	7.90	4.75
Temple	5.97	6.45	5.73	3.99	4.50	3.73	6.93	10.30	5.73	4.86	8.30	3.63
California												
Navel and misc.	4.61	6.24	1.20	2.95	4.58	-.46	5.58	7.28	.38	3.96	5.66	-1.24
Valencia	3.66	5.86	1.88	1.82	4.02	.04	14.41	17.14	.73	12.67	15.40	-1.01
All	4.16	6.10	1.61	2.42	4.37	-.16	8.32	10.56	.46	6.66	8.90	-1.19
U.S. 2/	5.85	6.32	5.68	4.15	4.65	3.98	7.18	10.22	5.98	5.44	8.55	4.20
GRAPEFRUIT:												
Florida												
Seedless	3.48	4.91	1.86	2.13	3.61	.47	4.17	5.60	2.97	2.72	4.20	1.48
Seeded	2.00	(3)	2.00	.70	(3)	.70	2.73	(3)	2.73	1.33	(3)	1.33
All	3.30	4.91	1.89	1.96	3.61	.52	4.01	5.60	2.93	2.57	4.20	1.45
Texas	2.16	2.66	1.00	1.26	1.75	.14	2.93	3.14	1.19	2.03	2.24	.24
California	3.33	5.44	.09	1.94	4.05	-1.31	3.96	6.50	-.12	2.52	5.06	-1.56
Arizona	2.55	4.17	.12	1.11	2.73	-1.32	4.29	5.88	-.08	2.85	4.44	-1.52
U.S.	7.82	11.46	2.02	5.19	8.84	-.64	7.61	10.84	2.11	4.93	8.14	-.55
LEMONS:												
California	4.38	9.36	.22	1.22	6.20	-2.94	5.57	10.32	.10	2.37	7.12	-3.10
Arizona	4.41	9.09	.24	1.25	5.93	-2.92	4.83	8.27	.08	1.63	5.07	-3.12
U.S.	4.39	9.30	.22	1.23	6.14	-2.94	5.43	9.91	.10	2.23	6.71	-3.10
TANGERINES:												
Florida	10.14	13.35	3.85	7.57	10.85	1.15	8.26	10.00	4.17	5.58	7.35	1.42
California	6.19	10.80	.99	3.69	8.30	-1.51	7.36	13.80	.99	4.86	11.30	-1.51
Arizona	6.28	8.72	1.04	3.23	5.67	-2.01	6.72	8.62	1.40	3.67	5.57	-1.65
U.S.	7.82	11.46	2.20	5.19	8.84	-.64	7.61	10.84	2.11	4.93	8.14	-.55
TANGELOS:												
Florida	6.34	7.85	4.87	4.37	5.90	2.87	5.57	6.90	4.51	3.51	4.90	2.41
LIMES:												
Florida	13.09	21.10	2.32	8.39	16.10	-1.98	11.67	19.40	2.22	6.98	14.40	-2.08

1/ P.H.D.—Packinghouse-door. 2/ Excludes Temples. 3/ Fresh sales insignificant.

SOURCE: Agricultural Prices, SRS, USDA.

Table 20.--Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies, and movement, 1981/82-1983/84 season

Item and season	Carryin	Pack		Imports and other supplies		Supply		Movement		Stocks 1/
		To date 1/	Total season	To date 1/	Total season	To date 1/	Total season	To date 1/	Total season	
					1,000 gallons 2/					
Oranges:										
1981/82	68,987	133,294	133,294	74,416	81,611	276,697	283,892	202,294	230,317	74,403
1982/83 3/	53,379	169,577	169,577	43,529	58,847	266,485	281,803	200,302	281,979	66,183
1983/84	42,824	121,216		93,064		257,104		198,709		58,395
Grapefruit:										
1981/82	8,404	21,869	21,869	25	33	30,298	30,306	16,938	18,900	13,360
1982/83 3/	11,406	14,483	14,483	286	587	26,175	26,476	18,014	21,027	8,162
1983/84	5,449	19,291		745		25,485		18,628		6,857
Tangerine:										
1981/82	455	924	924	19	19	1,398	1,398	949	1,005	449
1982/83 3/	393	334	334	170	170	897	897	742	790	155
1983/84	107	636		251		994		657		337

1/ For the 1983/84 season, week ending October 13; 1982/83 October 8; 1981/82 October 9. These respective dates include data through the 45th week of each season. 2/ Orange and tangerine, 42.0 Brix; grapefruit, 40 Brix. 3/ 1982/83 season incorporates 53 weeks.

SOURCE: Florida Citrus Processors Association.

Table 21.--Chilled citrus products: Florida canners' stocks, packs, supplies, and movement, 1981/82-1983/84 season

Item and season 1/	Beginning stocks	Pack 2/	Total supply	Season movement	Ending stocks
			1,000 gallons		
Orange juice, (s.s.):					
1981/82	15,934	181,000	196,934	182,279	14,656
1982/83	14,656	185,150	199,806	182,287	17,519
1983/84	17,519	273,827	291,346	264,995	26,351
Grapefruit juice, (s.s.):					
1981/82	2,482	22,943	25,425	23,224	2,201
1982/83	2,201	20,336	22,537	21,177	1,360
1983/84	1,360	27,642	29,002	27,336	1,666
Grapefruit sections:					
1981/82	504	1,579	2,083	1,476	607
1982/83	607	888	1,495	1,069	426
1983/84	NA	NA	NA	NA	NA
Orange sections:					
1981/82	289	493	782	559	224
1982/83	224	364	588	403	185
1983/84	NA	NA	NA	NA	NA
Citrus salad:					
1981/82	238	1,705	1,943	1,470	472
1982/83	472	1,235	1,707	1,288	419
1983/84	NA	NA	NA	NA	NA

1/ Season beginning approximately October 1. 2/ Packs of chilled juices include products of fresh fruit and frozen concentrate and excludes reprocessed single-strength (s.s.) bulk. NA = Not available.

SOURCE: Florida Citrus Processors Association.

Table 22.--Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, 1981/82-83/84 season

Item and season 1/	Beginning stocks	Pack	Total supply	Season movement	Ending stocks
			1,000 cases, 24 No. 2's		
Juices, (s.s.): 2/					
Orange: 3/					
1981/82	2,494	11,503	13,997	11,594	2,404
1982/83	2,404	9,802	12,206	10,792	1,414
1983/84	1,414	9,084	10,498	9,311	1,187
Grapefruit: 4/					
1981/82	3,308	15,725	19,033	14,766	4,267
1982/83	4,266	11,651	15,917	13,495	2,422
1983/84	2,421	9,513	11,934	10,231	1,703
Blend:					
1981/82	339	727	1,066	865	201
1982/83	201	650	851	702	150
1983/84	150	555	705	606	99
Tangerine:					
1981/82	4	6	10	8	2
1982/83	1	4	5	4	1
1983/84	(5)	(5)	(5)	(5)	(5)
Canned fruits:					
Grapefruit sections:					
1981/82	407	1,344	1,751	1,364	387
1982/83	388	1,235	1,623	1,160	462
1983/84	NA	NA	NA	NA	NA
Orange sections:					
1981/82	7	14	21	17	4
1982/83	4	35	39	22	17
1983/84	NA	NA	NA	NA	NA
Citrus salad:					
1981/82	20	69	89	73	16
1982/83	16	94	110	69	41
1983/84	NA	NA	NA	NA	NA

1/ Season beginning approximately October 1. 2/ Single-strength (s.s.). 3/ "Reconstituted canned orange juice," which has never been included in the Association's statistics, is now included with "orange juice." 4/ "Reconstituted canned grapefruit juice," which previously has been reported separately, is now included with "grapefruit juice."
5/ Less than 1,000 cases. NA = Not Available.

SOURCE: Florida Citrus Processors Association.

Table 23.—U.S. producer price indexes of selected dried and frozen items, by months, 1981–84

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
						1967=100						
Dried fruit:												
Prunes												
1981	273.7	270.7	270.7	272.7	270.7	270.7	270.7	270.7	270.7	270.7	270.7	278.7
1982	278.7	281.7	281.7	281.7	281.7	281.7	281.7	281.7	284.2	284.2	284.2	281.7
1983	NA	281.7	281.7	281.7	NA	281.7	NA	281.7	NA	281.7	NA	281.7
1984	281.7	281.7	284.1	284.1	284.1	284.1	284.1	284.1	288.0			
Raisins												
1981	459.1	443.5	443.5	443.5	448.0	448.0	459.1	459.1	459.1	459.1	459.1	462.7
1982	462.7	452.4	452.4	452.4	448.0	448.0	448.0	448.0	445.5	454.6	454.6	454.6
1983	NA	450.6	449.8	449.7	NA	450.6	NA	449.8	NA	429.2	NA	428.5
1984	425.2	425.7	423.6	423.6	411.5	411.5	411.5	306.7	307.5			
Frozen juice:												
Orange, conc.												
1981	231.8	280.2	312.2	338.1	338.1	338.1	338.1	338.1	335.0	335.0	326.3	313.8
1982	312.9	328.8	336.4	328.2	316.5	309.5	309.4	307.1	307.8	307.7	307.5	303.2
1983	304.0	300.8	299.6	299.1	302.3	300.7	301.0	300.8	302.4	302.5	303.8	303.8
1984	314.9	356.5	369.5	380.7	385.1	395.0	386.7	387.8	396.2			

NA = Not available.

SOURCE: Bureau of Labor Statistics, U.S. Department of Labor.

Table 24.—U.S. monthly average price indexes for fruits, September 1983–84

Item	1983	1984								
	Sept.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
						(1967=100)				
Producer price index:										
Fresh fruit	262.6	232.9	232.2	320.3	213.2	239.4	259.7	251.1	268.0	301.5
Citrus fruit	265.4	152.1	155.6	153.7	156.7	179.7	206.8	240.0	248.4	248.3
Other fruit	259.3	268.4	265.7	249.3	237.6	265.2	282.3	254.4	275.0	323.8
Dried fruit	413.6	404.2	404.6	405.5	408.8	404.5	405.0	405.3	357.3	360.5
Canned fruit and juice	288.4	301.0	311.0	310.5	309.4	313.6	315.4	315.5	315.4	311.1
Canned fruit	254.5	265.2	272.8	268.1	266.3	269.6	271.0	271.1	270.3	264.0
Canned fruit juice	341.7	357.2	371.1	377.4	377.3	383.2	385.5	385.5	386.8	385.6
Frozen fruit and juice	302.3	308.2	339.9	341.9	349.9	351.9	359.1	353.3	352.8	358.0
Consumer price index:										
Fresh fruit	316.7	289.6	296.0	300.5	304.2	315.2	343.3	346.9	353.3	364.8
						(1977=100)				
Index of fruit prices received by growers 1/	105	129	128	130	134	161	203	207	245	287

1/ Index for fresh and processed.

SOURCES: Bureau of Labor Statistics, U.S. Department of Labor, and Agricultural Prices, SRS, USDA.

Table 25.--U.S. monthly average fruit prices received by growers, October 1983-84

Commodity and unit	1983	1984									
	Oct.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.
Apples for fresh use (cts./lb.)	16.5	14.3	15.9	16.1	15.5	15.4	15.3	18.6	18.3	20.7	18.4
Pears for fresh use ($/ton)	260	193	201	165	133	86	101	--	237	271	300
Peaches for fresh use (cts./lb.)	--	--	--	--	--	--	22.9	14.5	17.3	23.5	--
Strawberries for fresh use (cts./lb.)	120.0	130.0	66.6	49.0	35.2	43.0	49.7	50.1	51.5	78.0	105.0
Oranges:											
($/box) 1/											
Fresh use	2.77	6.52	5.67	5.30	6.35	11.92	14.49	15.60	16.60	15.46	18.42
Processing	.05	3.19	4.36	3.48	4.62	6.79	7.80	-1.01	-1.01	.18	.18
All	1.06	3.65	4.62	4.23	5.21	8.06	9.50	12.74	13.34	11.95	15.01
Grapefruit:											
($/box) 1/											
Fresh use	4.56	3.74	4.33	4.45	4.86	5.44	5.17	5.26	4.78	4.92	6.60
Processing	-.94	.26	1.09	2.32	2.34	.93	-.76	-1.53	-1.54	-1.54	.09
All	3.32	2.14	1.95	3.05	3.57	3.63	2.31	1.18	2.85	2.30	5.26
Lemons:											
($/box) 1/											
Fresh use	8.17	1.13	1.17	1.80	3.39	8.72	16.32	14.92	9.52	13.91	11.09
Processing	-3.11	-3.10	-3.10	-3.10	-3.10	-3.10	-3.10	-3.10	-3.12	-3.12	-1.47
All	3.71	1.24	1.51	.91	.33	4.29	10.65	10.26	6.36	8.28	4.11
Tangerines:											
($/box) 1/											
Fresh use	11.15	10.35	8.45	7.55	7.25	4.79	9.70	9.70	--	--	21.70
Processing	.25	-.94	-1.54	-1.53	-1.55	-1.56	-1.51	-1.51	--	--	3.00
All	8.56	5.15	4.92	2.89	3.48	2.64	5.03	4.10	--	--	16.75

1/ Equivalent on-tree returns.

SOURCE: Agricultural Prices, SRS, USDA.

Table 26.--Fresh fruit: Retail price, marketing margin, and grower--packer return, per pound, sold in Baltimore, season average, 1981/82-1983/84

Commodity and season	Retail price 1/	Marketing margin		Grower--packer return (f.o.b. shipping point price) 2/	
	(Cents)	Cents	Percent of retail price	Cents 3/	Percent of retail price
Apples, Eastern Delicious:					
1981/82	42.3	14.6	34	27.7	66
1982/83	38.9	22.8	59	16.1	41
1983/84	36.8	17.8	48	19.0	52
Apples, Washington Red Delicious:					
1981/82	63.3	29.8	47	33.5	53
1982/83	62.4	38.0	61	24.4	39
1983/84	68.2	40.8	60	27.4	40
Grapefruit, Florida:					
1981/82	25.1	15.7	63	9.4	37
1982/83	25.3	15.9	63	9.4	37
1983/84	26.4	17.2	65	9.2	35
Lemons, Western:					
1981/82	81.4	56.3	69	25.1	31
1982/83	72.9	49.0	67	23.9	33
1983/84	80.5	53.8	67	26.7	33
Oranges, California Navel:					
1981/82	43.2	24.8	57	18.4	43
1982/83	38.0	23.5	62	14.5	38
1983/84	40.4	23.9	59	16.5	41
Oranges, California Valencia:					
1981	45.9	30.8	67	15.1	33
1982	50.2	26.6	53	23.6	47
1983	36.9	23.4	63	13.5	37
Oranges, Florida:					
1981/82	30.1	17.7	59	12.4	41
1982/83	24.7	12.6	51	12.1	49
1983/84	35.6	20.4	57	15.2	43

1/ Retail price, Maryland State Department of Agriculture. 2/ Production area and season: Eastern Delicious Apples - New York State (Oct.-May); Washington Red Delicious Apples - Washington State (Nov.-May); Florida Grapefruit (Nov.-Apr.); Western Lemons - California (Aug.-July); California Navel Oranges (Dec.-May); California Valencia Oranges (May-Nov.); Florida Oranges (Nov.-May). 3/ Adjusted to account for waste and spoilage during marketing.

SOURCE: Economic Research Service, USDA.

Table 27.--U.S. exports of selected dried fruits and tree nuts by destination, 1981/82-1983/84

Item and season 1/	Canada	Europe				Japan	Other	World
		West Germany	Other EC 2/	Other	Total			
	Metric tons							
Prunes:								
1981/82	3,200	6,423	21,956	10,126	38,505	6,458	10,052	58,215
1982/83	3,380	4,159	16,871	10,090	31,120	11,203	7,090	52,793
1983/84	2,764	5,303	18,317	10,926	34,546	9,537	5,877	52,724
Raisins:								
1981/82	7,638	3,400	6,996	9,843	20,239	15,350	12,823	56,050
1982/83	6,562	2,966	6,521	5,925	15,412	17,758	13,688	53,420
1983/84	4,283	2,899	9,163	7,705	19,767	14,095	11,950	50,095
Shelled almonds:								
1981/82	2,675	24,281	15,310	7,678	47,269	8,610	14,230	72,784
1982/83	3,322	13,986	13,951	7,949	35,886	9,900	9,836	58,944
1983/84	3,092	12,086	13,153	6,946	32,185	12,278	10,273	57,828

1/ Season beginning August 1, for prunes and raisins, and July 1 for almonds. 2/ Belgium-Luxembourg, France, United Kingdom, Italy, Netherlands, Denmark, Ireland, and Greece.

SOURCE: Foreign Agricultural Service, USDA.

Prospects for the 1985 farm bill will come under close scrutiny at **Outlook '85**, USDA's 61st annual agricultural outlook conference, which will be held in Washington, D.C., December 3-5, 1984. As is its tradition, the conference will lead off with the outlook for the economy, agriculture and trade, and international policy—major components of today's agricultural equation.

OUTLOOK '85

Shorter and tighter than in recent years, the conference will provide policymakers with a complete overview of the agricultural situation in 3 days. Secretary of Agriculture John Block is scheduled to open the proceedings with an address at 10 a.m. Monday, December 3. Two special panels on the 1985 farm bill will follow, one focusing on the environment for the new legislation and the second including viewpoints from members of Congress, the Administration, and the farm and private sectors. Succeeding sessions will cover the major farm commodities, while sessions on family economics and nutrition are scheduled over the 3 days.

This year for the first time, listeners outside the Washington area will be able to call in questions to certain follow-up sessions for major commodities. Callers will use a regular long-distance business line at regular long-distance rates.

The **Fruit 1985 Outlook Session** will be held on Tuesday, December 4, at 2.15 p.m.

As last year, a 900-line service will allow listeners to hear all sessions. The service costs 50 cents for the first minute and 35 cents for each additional minute. Thus, you can hear an hour-long session for less than $22, plus tax.

For a copy of the preliminary **Outlook '85** program, which contains time and location for each session, please write: Outlook '85, USDA/WAOB, Room 5143-S., Washington, D.C. 20250.

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